

THE CALIFORNIA ASSESSMENT OF SENIORS AND SERVICE

A Report on Key Findings

Prepared By:



For:



Governor's Office on Service and Volunteerism

In Cooperation with:

AARP

Civic Ventures

The Corporation For National Service

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EXECUTIVE SUMMARY

The California Assessment of Seniors and Service is the first comprehensive study of current and future interest in volunteering and community service among older Californians. The study explores the attitudes and experiences of at least two generations of seniors—those currently over the age of 65 years as well as members of the leading edge of the baby boom generation, now 50-54 years of age.

What are older Californians' attitudes towards retirement, and how do service and volunteering fit into their retirement plans? How prevalent is volunteer and service experience among California seniors? What is their level of interest in volunteering and service in the future? These and other key questions are answered in this report.

VOLUNTEER ACTIVITIES AND INVOLVEMENT

Drawing upon the findings from a population-based survey and regional focus group discussions, this assessment describes participating seniors' attitudes towards and plans for retirement, current volunteer activities, anticipated future service activities, and potential strategies to engage seniors in volunteer service. While the study assesses interest in a wide range of volunteer service activities, we highlight interest among seniors in intergenerational service with children and youth in particular.

California seniors view retirement as a vibrant time in life during which they will seek out new activities and challenges. When asked to respond to specific statements reflecting possible attitudes about retirement, these California seniors most frequently state they view retirement as an “opportunity to start new activities or learn new skills” and as a “time to set new goals and pursue new challenges.”

Volunteering is second only to travel in the retirement plans of California seniors. Over half (53.0%) of participating seniors report that they plan to engage in volunteer activities during retirement. The findings of this assessment indicate that an increase in volunteerism may be anticipated among many seniors in the coming years, particularly among those who are volunteering currently, as well as among those who have never volunteered or have not done so recently.

California seniors will be the healthiest, best-educated, and most vigorous generation of senior volunteers ever. Baby boomers, seniors with higher levels of education, and those in the best of health are most likely to now be volunteering and to indicate their involvement will either continue or increase in the future.

About a third of seniors (33.7%, \pm 4.2%) say their involvement with volunteering will increase in the future. About three quarters of seniors are current volunteers who say they will either continue their involvement or their level of involvement with volunteering will increase. Baby boomers are even more

Baby Boomers ~ The Next Generation of Seniors

Baby Boomers—participants ages 50-54 years—feel more strongly than the current generation of seniors that:

- retirement is “an opportunity to start new activities or learn new skills” and that retirement is “a time to set new goals and pursue new challenges”
- their current significant levels of volunteer activity will either continue or increase in the future
- they volunteer because it “makes me feel good about myself,” it “gives me a new perspective on things,” and they like “new challenges and learning new things”
- they want to do volunteer work that is different from their career work
- they are interested in intergenerational service activities such as reading with children or adults, teaching or tutoring

likely than other generations of seniors to say their future involvement will increase, a difference that holds up after controlling for retirement status in the analysis.

Seniors express diverse future interests, with an accent on intergenerational service. Seniors express a consistently high level of future interest in volunteering in a number of program areas and service activities. Particular program areas of greatest interest overall include education programs, programs for community safety, and programs related to community issues. Seniors also express interest in activities with intergenerational components, such as those that involve reading with either children or adults, teaching or tutoring, and being a mentor. *Intergenerational service programs and activities are of greater interest among volunteers who intend to increase their volunteer involvement than among seniors overall.* Women, seniors with moderate to high household income, and those in the best of health are also most likely to express interest in working with children and youth.

Seniors volunteer because it provides a sense of accomplishment and because they care. Most of these seniors (77.1%) say they volunteer because in doing so they feel they have “accomplished something real and useful.” Over half say they volunteer because it “makes a positive difference in the community where I live” and they “feel compassion toward people in need.”

About half (45.8%) of these seniors now are volunteering or have volunteered within the last two months. Another one third have volunteered either in the past year or more than a year ago. Women, seniors with higher levels of education, seniors with moderate to high household income, and those in the best of health are the most likely to have recent volunteer experience. The largest proportion of seniors with prior volunteer experience gave 2-4 hours per week in their most recent volunteer role. Current volunteers most often tend to be working with religious programs, followed by adult programs, children or youth programs, and education programs. Serving on a board or committee is the most common volunteer activity in which California seniors are engaged currently.

Seniors most commonly prefer volunteering 2-4 hours per week. Almost half (45.8%) of senior survey respondents would prefer to volunteer 2-4 hours per week. One quarter of seniors (24.1%) are interested in a level of involvement greater than four hours per week in various volunteer activities. Seniors interested in a level of involvement greater than four hours per week also express significant interest in intergenerational service activities: almost half (49.4%) are interested in activities that involve reading with children or adults, while 41.6% are interested in teaching or tutoring and 38.4% are interested in being a mentor.

ENGAGING SENIORS IN SERVICE

Senior volunteers have heard about their opportunities primarily through one of three means: a church or other religious organization, word of mouth from a friend or relative, and a club or organization. How senior volunteers have heard about volunteer opportunities varies significantly by race/ethnicity, income, and gender. Focus group discussions with senior volunteers confirm the survey findings, although only a few participants specifically mentioned a church/religious organization or another organization they belong to as their source of information about volunteering. Rather, most volunteers said that they became interested in volunteering through friends and family, a connection to their former profession, or other personal experience with social services. Others began volunteering through a gradual increase over time in their involvement with a particular organization or program.

Seniors want to find volunteer opportunities that are meaningful to themselves and others. Most participating California seniors overall, as well as most seniors who report that they “maybe” are interested in a significant volunteer commitment, would be

encouraged to volunteer, “If I knew the volunteer opportunity was meaningful or made a difference in people’s lives.” Similarly, trust in the significance and goals of the place of volunteer would encourage these seniors to volunteer, “If I found an organization with values and a mission that I truly support.” Other support of particular importance includes the reassurance that the volunteer’s skills are relevant, the opportunity to meet people and make friends, a safe and pleasant place of volunteer, and volunteer skills training.

Seniors perceive barriers to volunteering, such as transportation. Focus group participants mentioned a number of incentives and barriers to volunteering. Most strikingly, transportation was the most frequently cited obstacle mentioned by volunteer seniors in all three of the focus groups.

Tailored strategies and messages can engage seniors at different stages of readiness to volunteer. The Stages of Behavior Change Model, which proposes that individuals generally move through five states in changing a particular behavior, may be used to inform messages to seniors based on their individual stage of readiness with respect to volunteering. This report includes specific strategies for engaging people in the first three stages of engagement with volunteering. For those in the *pre-contemplation* stage—individuals who have never thought about volunteering and may not know that there is a need for volunteers—messages and strategies should increase their awareness of the importance and availability of volunteer opportunities. For those in the *contemplation* stage—individuals who have never volunteered or have not done so recently but indicate they may do so in the future—strategies for engagement include assistance finding out about volunteer activities, as well as training and support. For those who are *ready for action*—individuals who are thinking about volunteering and are on the verge of doing so—an educational award or scholarship, stipend or other similar incentive may support their engagement.

CHARACTERISTICS OF PARTICIPATING SENIORS

At least two generations of seniors are represented. Seniors who responded to the survey are between the ages of 50 and 86 years, with an average age of 62 years. Participants may be described as members of at least two separate “generations” with distinct characteristics. The study reveals that baby boomers currently between the ages of 50-54 years have significantly greater levels of interest in future service activities in general and intergenerational service in particular.

As with volunteers in general, women are more likely to be represented. Sixty percent (59.6%) of survey participants are female, although females comprise 50% of the senior population ages 50-75 years in California. Since women are known to be proportionately more involved in volunteering than men, their over-representation in the survey sample is not surprising.

All major racial/ethnic groups are represented, but Latinos are comparatively under-represented. Comparison of survey participants’ race/ethnicity to the overall population of California seniors reveals that Latino/a seniors are under-represented in the sample (comprising 9.2% compared to 36% of the overall senior population) while Caucasian seniors are over-represented (comprising 73.1% compared to 46% of the overall senior population).

Seniors from all income groups participated, though participants have a higher level of educational attainment and better health than the overall senior population. Seniors participating in the survey represent all income groups in proportions that reflect the overall population. But, compared to the overall population, this group of seniors has a higher level of educational attainment. In addition, half (50.0%) say their health is good and 39.9% say they are very healthy. That the vast majority of participating seniors say their

health is either good or very healthy suggests that seniors who responded to the survey might represent a comparatively healthier cross-section than the overall senior population.

AREAS FOR FURTHER INVESTIGATION

Although this report elicits information about a fairly representative group of California seniors in many respects, the following populations merit further qualitative research with regards to community service:

- Senior men
- Latino/a seniors
- Monolingual non-English-speaking seniors in general
- Seniors with no volunteer experience

In addition, these data imply that age/generation may be a more powerful predictor of attitudes and behavior than retirement status. This suggests that research with a primary focus on representation across generational groups could yield additional insights.



INTRODUCTION: THE CALIFORNIA ASSESSMENT OF SENIORS AND SERVICE

PURPOSES OF THIS STUDY

In August 2000, the California State Assembly passed AB2558 (Hertzberg), requiring the Governor's Office on Service and Volunteerism (GO SERV) to establish a three-year, senior service pilot project in cooperation with other public and nonprofit organizations (Chapter 597 of the Statutes of 2000). The proposed pilot project for senior involvement in community service was based on the Experience Corps® model developed by Civic Ventures. In September 2000, California Governor Gray Davis signed AB2558 and asked GO SERV to carry out this study in place of the pilot project.

A core planning group—lead by The Governor's Office on Service and Volunteerism (GO SERV) and including AARP, Civic Ventures, and the Corporation for National Service—has partnered to produce this statewide, California Assessment of Seniors and Service. For more information about the study sponsors, please see Appendix D. These partners retained the services of a private research firm, LaFrance Associates, to conduct the study.

Through a combination of quantitative and qualitative research methods, the California Assessment of Seniors and Service seeks to achieve the following goals:

- To assess the prevalence and level of interest in community service in general, and the level of interest in intergenerational service in particular, among seniors ages 50-75 years.
- To ascertain effective strategies for engaging seniors ages 50-75 years in service—including what messages would attract them to volunteer—as well as what structural barriers may need to be addressed to support their ongoing participation in service activities.
- To gauge preferences among seniors interested in service such as the amount of time they could offer, times of day they are available, the distance they are willing and able to travel, and settings in which they would like to serve.
- To identify characteristics of seniors—such as age, sex, income, race, educational level, religious affiliation, retirement status, and attitudes towards retirement—that are related to general interest in service as well as specific service activities.

Using a strengths-based perspective, this study is predicated on the belief that seniors possess unique skills, experience, and knowledge and that these qualities can enhance community projects in general, and projects devoted to children and youth in California in particular. Intergenerational service participation may be mutually beneficial to seniors, youth, program staff in community-based organizations, and the health and well being of all members of our communities.

SUMMARY OF ASSESSMENT METHODS

A random-sample mail survey¹ and regional focus groups were the two primary research methods employed by The California Assessment of Seniors and Service to accomplish study goals. Additional methods used include secondary demographic data collection and materials review. With a goal of

¹ We gratefully acknowledge Michael Cheang, DrPH and Kathryn Braun, DrPH—with the Center on Aging, Office of Public Health Studies, School of Medicine, University of Hawai'i at Manoa—whose Hawai'i Community Foundation-sponsored study *Senior Volunteers As Assets: A Statewide Survey* (January 2001) informed the development of our survey instrument.

including individuals age 50 to 75 throughout California, the research team divided the state into four geographic regions—Northern, Southern, Central, and San Francisco/Bay Area—encompassing 27 counties.

Out of 2,400 surveys mailed to all four regions, 502 were completed and returned for analysis and another 118 were returned as undeliverable. Accounting for the undeliverable surveys, the final rate of response to the survey was 22.0%.

LFA conducted focus groups with seniors who have volunteer experience in the Southern, Central, and San Francisco/Bay Area regions. An additional focus group with seniors who do not have any, or at least not recent, volunteer experience was held in the San Francisco Bay Area. We used content analysis procedures to analyze data from all of the focus groups.

Please refer to Appendix B for a full discussion of assessment methods and Appendix C for the mail survey instrument and focus groups protocols.



KEY ASSESSMENT FINDINGS

What are older Californians' attitudes towards retirement, and how do service and volunteering fit into their retirement plans? How prevalent is volunteer and service experience among California seniors? What is their level of interest in volunteering and service in the future? These and other key study questions are answered in this section of the report.

RETIREMENT ATTITUDES, IDEAS, AND PLANS

Exhibits 1 and 2 reveal that California seniors view retirement as an active time in life during which they plan to seek opportunities and accomplish new goals.

As Exhibit 1 depicts, when asked to respond to the specific statements reflecting possible attitudes about retirement, these California seniors most frequently state they view retirement as an “opportunity to start new activities or learn new skills” (with 44.8% strongly agreeing) and as a “time to set new goals and pursue new challenges” (with 36.9% strongly agreeing).

Exhibit 1
How Much Do You Agree With The Following Statements About Retirement?

Attitudes and Ideas About Retirement	n	% Strongly Agree	Mean Level of Agreement	
Retirement is an opportunity to start new activities or learn new skills—things I’ve always wanted to do but never had time for.	480	44.8%	3.4	Strongly Agree 4
Retirement is a time to set new goals and pursue new challenges, a time to expand horizons.	480	36.9%	3.2	Agree 3
Retirement is a time to enjoy leisure activities.	482	23.2%	3.1	Disagree 2
Retirement is a time to take a much-deserved rest from work and daily responsibilities.	474	14.1%	2.7	Strongly Disagree 1
Retirement is a time to take it easy.	478	13.4%	2.6	

Consistent with their attitudes about retirement being a time for new opportunity and growth, these seniors do not invest much in traditional notions of retirement as a time for inactivity. Only 14.1% of participants strongly agree that retirement is a time to rest and 13.4% strongly agree that it is a time to take it easy.

These findings—that California seniors view retirement as an active time and a time full of potential for new opportunities—suggest that attitudinally they are already oriented towards engaging in activities such as volunteering and community service.

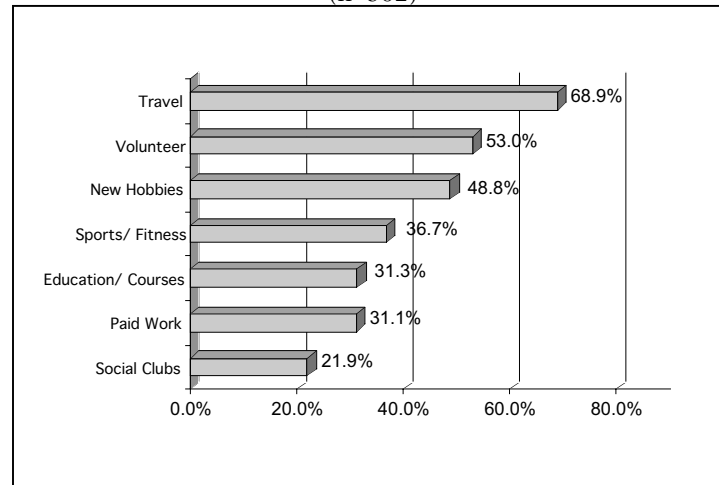
For planning purposes, it is also interesting to note that within this group of seniors those who are in the youngest age group—those age 50-54 years (mean=3.6)—feel even more strongly on average than their counterparts in the older age groups (mean=3.4 for those 55-64 years and 3.1 for those over 65 years) that retirement is “an opportunity to start new activities or learn new skills” (ANOVA, $p < .001$).

Similarly, these participants who are in the baby boom generation more strongly agree on average than their counterparts in prior generations that retirement is “a time to set new goals and pursue new

challenges” (mean=3.5 for those ages 50-54 years compared to 3.3 for those 55-64 years and 3.0 for those over 65 years; ANOVA, $p<.001$).

In fact, this hypothesis is supported by seniors’ reports of actual activities they plan to, if not already, engage in during retirement.

Exhibit 2
Planned Retirement Activities
(n=502)



As seen in Exhibit L above, seniors most commonly say they plan to travel in retirement, with 68.9% of participants indicating they will or already do so in their retirement years. Volunteering and community service is the next most common planned retirement-years activity, with over half (53.0%) of participating seniors reporting they plan to engage in service during retirement.

Participants who are ages 50-64 years report they plan to engage in some retirement activities in different proportions as compared to those 65 years of age and over. The younger two groups of seniors report in higher proportions that they plan:

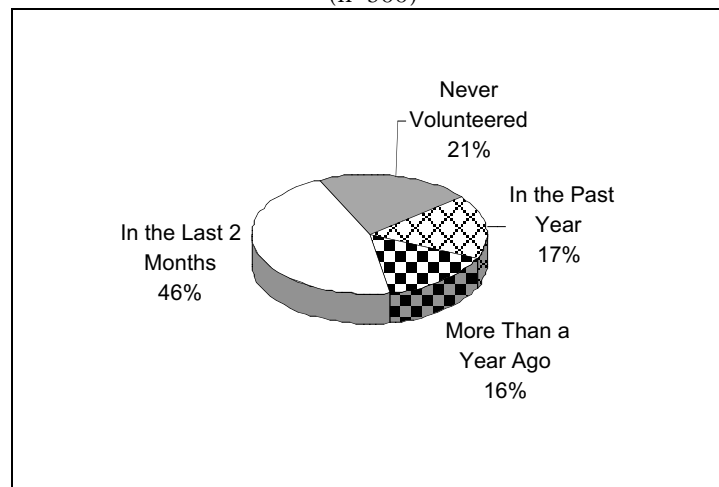
- To travel (76.6% of those 50-54 years and 73.1% of those 55-64 years, compared to 61.3% of those over 65 years; χ^2 , $p=.009$);
- To be involved in sports/fitness activities (40.4% of those 50-54 years and 41.7% of those 55-64 years, compared to 29.0% of those over 65 years; χ^2 , $p=.023$); and
- To continue their education and take courses (40.4% of those 50-54 years and 33.3% of those 55-64 years, compared to 25.3% of those over 65 years; χ^2 , $p=.028$).

PRIOR VOLUNTEER EXPERIENCE

A substantial proportion of seniors participating in this assessment report they have volunteered at some point in their lives. Exhibit 3 reveals that over three quarters of participating California seniors have volunteered at some point in their lives.

Exhibit 3

When Was The Last Time You Did Any Volunteering? (n=500)



About half (45.8%) of these seniors are currently volunteering or have volunteered very recently—within the last two months. Just under one fifth (17.2%) have volunteered in the past year while 15.6% have volunteered more than a year ago.

How Does Prior Volunteer Experience Differ By Characteristics?

A number of characteristics are related to whether seniors report having prior volunteer experience. Specifically, prior volunteer experience varies significantly by gender, income, education, retirement status, health, and religious affiliation. The following discusses in detail how volunteer experience differs by these traits.

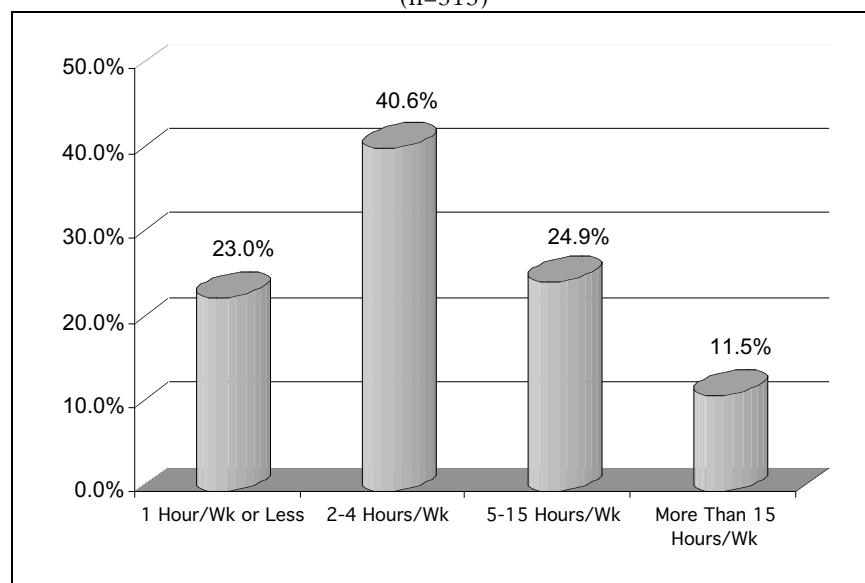
- **Gender.** Women are more likely to have volunteered in the past two months (49.5%) compared to men (41.2%) (χ^2 , $p=.034$).
- **Income.** Seniors with moderate/high income are the most likely to have volunteered in the past two months (48.2%) compared to other income brackets (36.0% of low income seniors and 32.5% of very low income seniors). Low-income seniors are the most likely to have volunteered more than a year ago (28.0%) as compared to others (14.1% of moderate/high income seniors and 12.5% of very low income seniors; χ^2 , $p<.001$).
- **Education.** Seniors with the highest levels of education are the most likely to have volunteered in the past two months (56.4% of those with some professional or trade school, 54.5% of those with some graduate school, 44.8% of those with some college, and 36.4% of those with some high school; χ^2 , $p<.001$).
- **Retirement Status.** Seniors who are retired are the most likely to have volunteered in the past two months (54.6%) as compared to other seniors (45.7% of semi-retired seniors and 40.8% of seniors who are not retired), although seniors who are not retired are the most likely to have volunteered in the past year (21.8%) as compared to other seniors (19.6% of semi-retired seniors and 10.8% of retired seniors; χ^2 , $p=.037$). This finding holds up when age is controlled for in the analysis.
- **Health Status.** Seniors who describe their health as “not so good” are the most likely never to have volunteered (48.0%) compared to other seniors (23.0% of seniors with “good” health and 12.2% of “very healthy” seniors). At the same time, seniors who describe themselves as “very healthy” are the most likely to have volunteered in the past 2 months (54.1%) and in the past year (20.4%) as compared to other seniors (43.1% of seniors with “good” health and 28.0% of seniors with “not so good” health have volunteered in the past 2 months; 16.9% of seniors with “good” health have

volunteered in the past year and 8.0% of seniors with “not so good” health have volunteered in the past year; χ^2 , $p < .001$).

- **Religious Affiliation.** Seniors who are currently affiliated with a church, temple, mosque, or other religious organization are the most likely to have volunteered in the past two months (56.5%) compared to other seniors (44.2% of seniors who have been affiliated in the past and 27.3% of seniors who have never been affiliated; χ^2 , $p < .001$).

The number of hours per week senior volunteers give is a measure of the intensity of prior volunteer experiences. Exhibit 4 provides the proportion of participating seniors who have given various amounts of their time per week in their most recent volunteer experience during the past year.

Exhibit 4
Of Those Volunteering Within The Past Year,
Hours Per Week Given During Most Recent Volunteer Experience
 (n=313)



About one in ten of these seniors (11.5%) served at the highest level of intensity, giving more than 15 hours per week of their time. Under half (40.6%) of seniors with prior volunteer experience gave 2-4 hours per week in their most recent volunteer role. Less than one quarter (24.9%) gave 5-15 hours per week and between one fifth and about one quarter (23.0%) of seniors who have prior volunteer experience say they gave one hour or less per week.

What Characteristics Are Related to the Number of Hours Per Week a Senior Volunteer Has Given?

Seniors' income and age are related to the number of hours per week senior volunteers have given in their most recent volunteer experience.

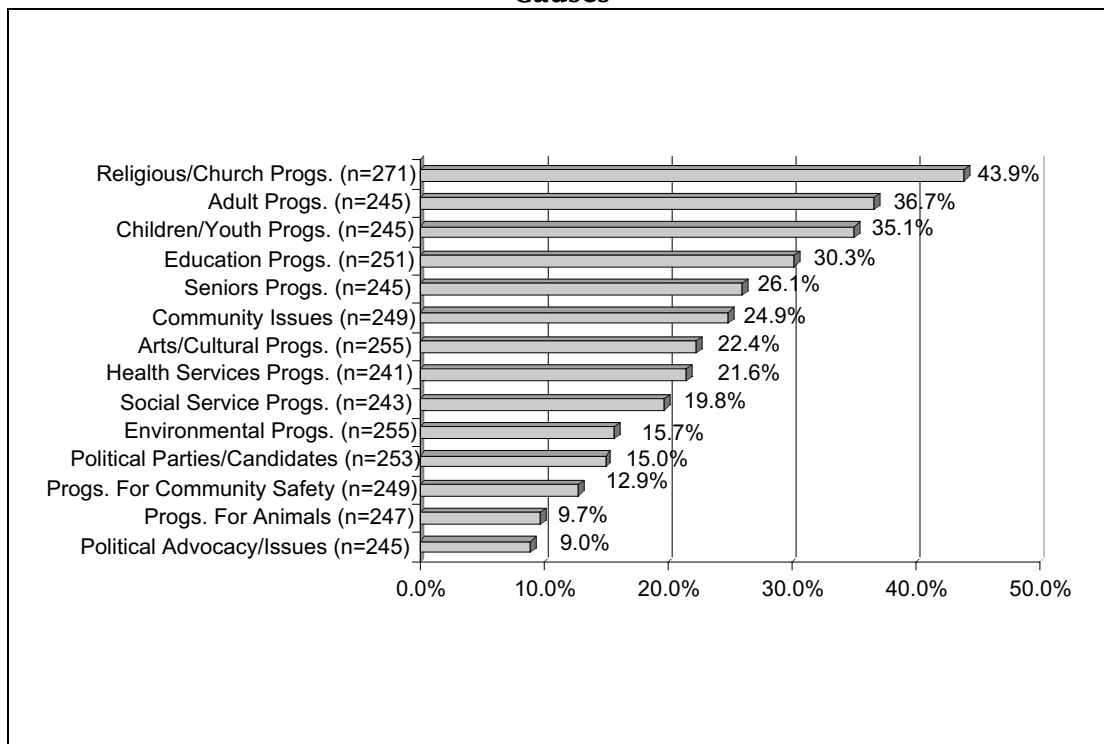
- **Income.** Seniors with very low income are the most likely to volunteer more than 15 hours per week (21.7%) compared to other seniors (12.8% of seniors with low income and 6.0% of seniors with moderate/high income; χ^2 , $p = .048$).
- **Age.** On average, seniors who have volunteered more than 15 hours per week are older in comparison to those who have volunteered fewer hours per week. The mean age of seniors who have volunteered more than 15 hours per week is 65.1 years as compared to those who have

volunteered 5-15 hours per week (mean age=61.7 years), 2-4 hours per week (mean age=62.0 years), and one hour or less per week (mean age=59.7 years; ANOVA, $p=.004$).

CURRENT INVOLVEMENT IN VOLUNTEER ACTIVITIES

California seniors currently give their time for a wide array of programs or causes and spend that time doing a variety of activities. Exhibit 5 shows the proportion of those participating seniors volunteering within the past year, who currently are involved with specific programs or causes. Participants may be participating in several of the following activities.

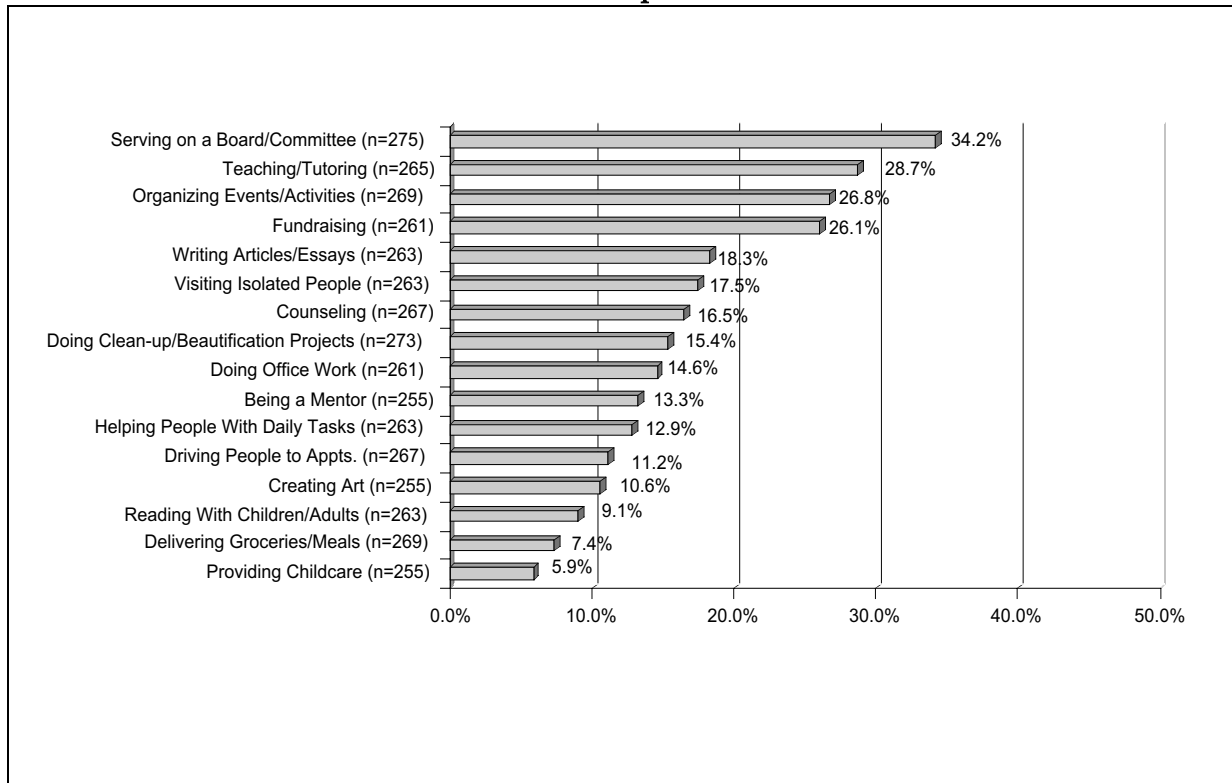
Exhibit 5
Of Those Volunteering Within The Past Year,
Current Volunteer Involvement With Types Of Programs Or Causes



Most commonly, volunteering seniors give of their time for religious programs, with over forty percent (43.9%) reporting to be doing this currently. Next in order of frequency, over one third (36.7%) of past-year volunteers are working with adult programs, and over one third (35.1%) of participating seniors are currently volunteering for children or youth programs. Education programs are also relatively common recipients of seniors' volunteer efforts: about one third (30.3%) of participating seniors currently volunteer for education programs.

Considering current involvement in specific volunteer activities, Exhibit 6 provides the spectrum of ways senior volunteers who have volunteered in the past year are spending the time they give to organizations or causes, in specific volunteer activities. Participants may be engaged in several of the following activities.

Exhibit 6
Of Those Volunteering Within The Past Year,
Current Involvement With Specific Volunteer Activities

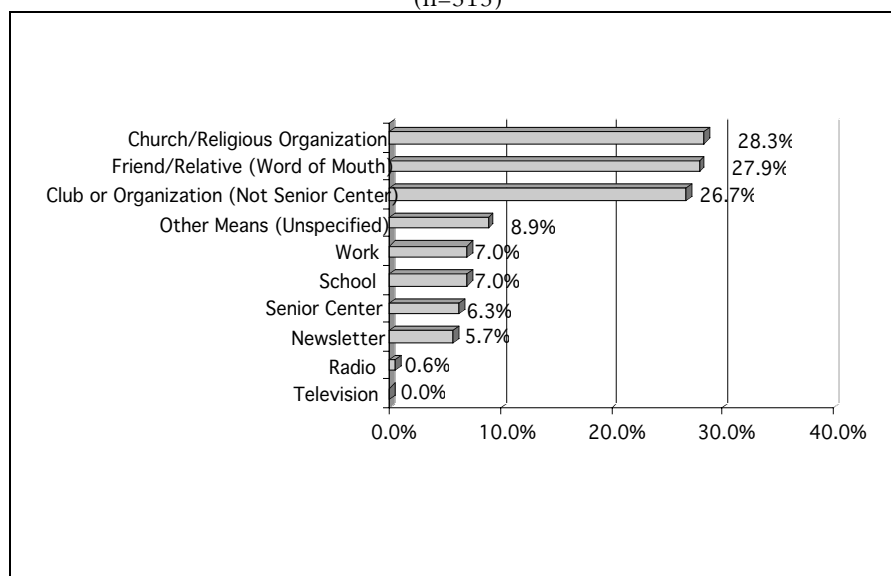


Serving on a board or committee is the most common volunteer activity in which California seniors are currently engaged, with one third of participants (34.2%) reporting they give their time in this way. This exhibit shows the prevalence of senior volunteers spending their time in activities that have intergenerational components, such as teaching or tutoring (28.7%), being a mentor (13.3%), and reading with children or adults (9.1%).

HOW SENIOR VOLUNTEERS HEARD ABOUT THEIR SERVICE OPPORTUNITIES

How did seniors learn about the volunteer opportunities in which they have participated? Exhibit 7 below displays the proportion of seniors hearing about their volunteer opportunities through various means.

Exhibit 7
How Senior Volunteers Heard About Their Service Opportunities
(n=315)



These senior volunteers have heard about their opportunities primarily through one of three means: a church or other religious organization (28.3%), word of mouth from a friend or relative (27.9%), and a club or organization other than a senior center (26.7%).

I'd just say, 'Frida, come with me, we're going here, you're gonna see how the place is whether you like it or not.' And that's how I did it, tell other friends of mine... They came with me, they saw it and they liked it. Simple.

—Southern California Focus Group Participant

What Characteristics Are Related to How Senior Volunteers Have Heard About Volunteer Opportunities?

How senior volunteers have heard about volunteer opportunities varies significantly by race/ethnicity, income, and gender. The following list highlights various information channels—church or other religious organizations, a club or other organization, and a friend or relative—that significantly interact with these traits.

- **Church or Other Religious Organizations.** African American (50.0%) and Asian American (41.7%) seniors, compared to seniors overall (28.3%), are more likely to have heard about their volunteer opportunities through church or other religious organizations (χ^2 , $p=.053$).
- **Club or Organization.** Asian Americans (41.7%), compared to seniors overall (26.7%), are more likely to have heard about their volunteer opportunities through a club or organization (other than a senior center) (χ^2 , $p=.038$). Seniors with low (32.1%) or moderate/high (32.2%) household incomes compared to seniors overall (26.7%) are also more likely to have heard about their volunteer opportunities through a club or organization (χ^2 , $p=.032$).

- **Friend or Relative.** Women (37.0%) are twice as likely as men (19.0%) to say they have heard about their volunteer opportunity through a friend or relative (χ^2 , $p < .001$). Seniors with very low household income (61.9%) are also twice as likely as seniors overall (31.6%) to say they heard about their volunteer opportunity through a friend or relative (χ^2 , $p < .001$). Lastly, retired seniors (42.3%) are about twice as likely as seniors who have not yet retired (23.5%) to say they heard about their volunteer opportunity through a friend or relative (χ^2 , $p = .001$).

Findings from focus group discussions confirm the survey findings, although only a few participants in the focus group of current volunteers specifically mentioned a church/religious organization or another organization they belong to as their source of information about volunteering. Rather, most volunteers from all three regions said that they became interested in volunteering through friends and family, a connection to their former profession, or other personal experience with social services. Others began volunteering through a gradual increase over time in their involvement with a particular organization or program.

Current volunteers identified in focus group discussions a number of sources that may be used to encourage other seniors to get involved with volunteering (not rank ordered):

- Word of mouth;
- An 800 number or hotline;
- Advertisements on the insides of public buses or at bus stops;
- In-person presentations at senior center lunches, churches, senior housing;
- Attractive leaflets or flyers;
- Public service announcements (PSA) on the radio;
- PSAs on television (5 and 6 o'clock news, early morning, late night); and
- Listings of specific volunteer jobs in a senior newsletter or section of newspaper.

Participants agree that seniors themselves are the best recruiters of other seniors and that they would be much more likely to volunteer if they heard directly from a senior who already was volunteering. They suggest this strategy for recruiting senior volunteers.

There was disagreement among participants about the usefulness of promoting volunteer opportunities through web sites, due to concerns about comfort level and access to technology among seniors.

San Francisco Bay Area volunteers mentioned the potential usefulness of a format that would combine information about many possible volunteer opportunities under one umbrella.

Volunteer focus group participants also provide a number of suggestions for specific messages to encourage volunteering.

It would be nice if there were some way to shop around. Because you get a sense of failure or letting someone down if you go out and sign up for a place and then it doesn't work out.... If there was some way you could make a few visits and just kind of watch for a while, so when you do make a selection it's a real commitment and you know what you are getting into.

–San Francisco Bay Area Focus Group Participant

- “Let people know why it’s so enjoyable and why people are having fun doing what they are doing as volunteers (things like meet more people, enjoy people, no loneliness, all those things). Use your website for those things.” (San Francisco Bay Area Participant)
- “Seniors in Action” (Southern California Participant)
- “Be Neighborly, Spread the Word, Volunteer” (Southern California Participant)

Many of the senior focus group participants who are not volunteering formally say they are otherwise engaged in community meetings, social or fundraising events, church groups, and exercise classes, and taking care of family members, particularly grandchildren. They suggested reaching potential senior volunteers through these channels, as well as through many of those suggested by current volunteers. They suggested the following messages:

- “Get out and help someone.”

- “Reward yourself and help someone else.”
- “It’s a learning experience. We learn from all people and all people have something to share.”

REASONS FOR VOLUNTEERING

Knowing the reasons why seniors who have volunteered do so is a critical element of understanding how to engage those who have not volunteered in service. Exhibit 8 shows that most frequently seniors who have volunteered in the past year give their time because they perceive service as a mutually beneficial exchange for those they serve as well as for themselves.

Exhibit 8
Reasons for Volunteering
Among Participants Who Have
Volunteered In The Past Year
 (n=315)

Reasons for Volunteering	Proportion Responding “Yes” to This Reason
Volunteering makes me feel like I’ve accomplished something real and useful.	77.1%
Volunteering makes a positive difference in the community where I live.	53.7%
I feel compassion toward people in need.	51.1%
Volunteering makes me feel good about myself.	50.5%
I like to spend time with other people.	43.5%
Volunteering gives me a new perspective on things.	41.0%
I like new challenges and learning new things.	41.0%
When I volunteer, I feel better physically.	29.5%
Volunteering is valued by our society.	25.1%
I volunteer for some other reason.	8.3%
I can make new contacts that might help my business or career.	7.0%

Remarkably, over three quarters of these seniors (77.1%) say they volunteer because in doing so they feel they have “accomplished something real and useful.” Over half say they volunteer because it “makes a positive difference in the community where I live” (53.7%) and they “feel compassion toward people in need” (51.1%).

I have a place to go and I’m proud.

–Central California Participant

I volunteer because I love children; they are just my heart.

–San Francisco Bay Area Participant

What is satisfactory to me is that I visit people and they are usually very glad to see me. I think that makes me feel good, to be needed. That’s probably the main reason I volunteer.

–San Francisco Bay Area Participant

You’re giving and doing and enjoying [volunteering]; the organizations and people served are enjoying it. It’s a ‘feel-good’ situation.

–San Francisco Bay Area Participant

I didn’t want to stay at home by myself.... I’ve met a lot of friends. It’s just a good feeling, a very good feeling to volunteer.... You’re doing something.

–Southern California Participant

I love it. It feels like I’m doing something, working at the school.

–Central California Participant

It keeps me alert and alive. Alert because it keeps my mind going. Alive because I went into remission from leukemia for 17 years, and then my cancer came back in ’96. Every time I look at the young kids, it gives me something to think about. Actually, being with kids gives me a long-term commitment. Now I’m on my second leg of remission.

–San Francisco Bay Area Participant

To keep active is very important. By being active you don’t think about your ailments or things that might be bothering you or family problems. It’s just great to be occupied... and it’s wonderful to be accepted.

–Southern California Participant

I’ve always been a firm believer that if you don’t get out of that bed in the morning, you’re gonna die in that bed.

–Central California Participant

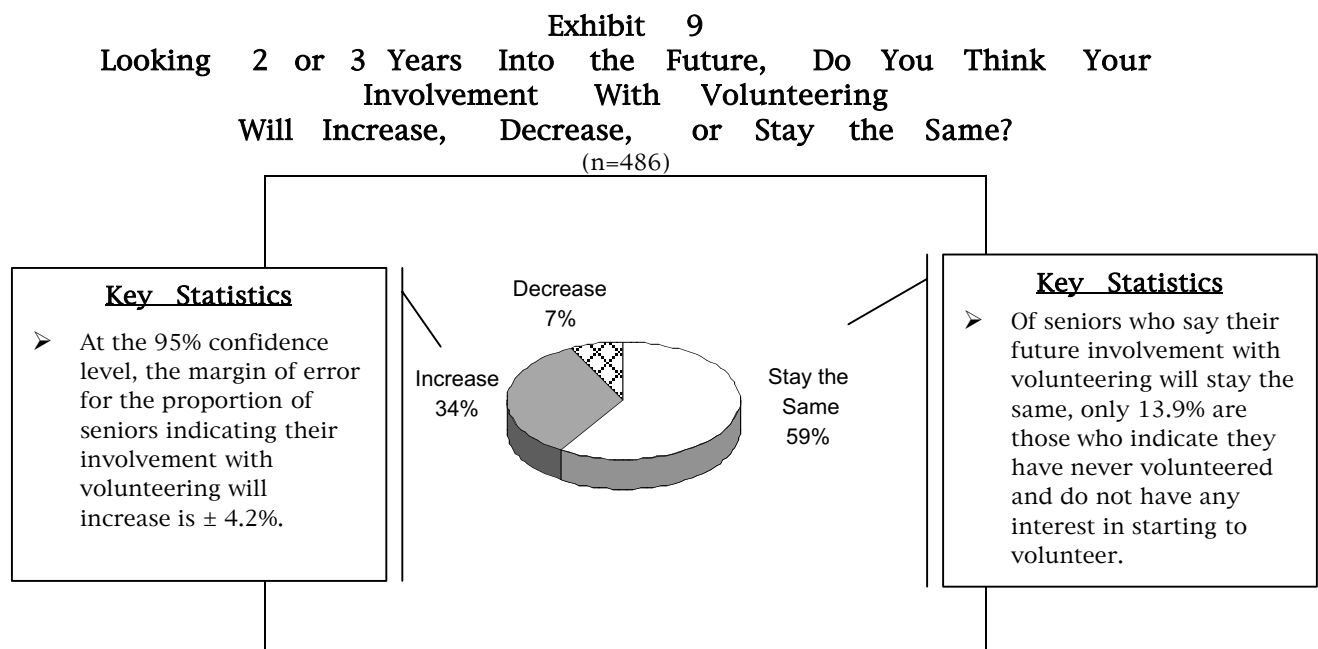
Considering the relationship between participant characteristics and reasons for volunteering, significant differences emerge for distinct age groups. Consistently, participants ages 50-54 years are more likely than seniors overall to report specific reasons. The reasons they are more likely to cite include: “volunteering makes me feel good about myself” (55.8% of 50-54 year olds compared to 47.1% of seniors overall; χ^2 , $p=.048$); “volunteering gives me a new perspective on things” (48.8% compared to 39.4%, respectively; χ^2 , $p=.023$); and “I like new challenges and learning new things” (46.5% compared to 37.9%, respectively; χ^2 , $p=.004$).

Focus group findings confirm the survey findings and add a depth of description about seniors’ motivations for volunteering. In the regional focus groups, seniors described their primary reasons for volunteering as follows:

- It is a way to stay busy and gain a sense of purpose.
- It is an opportunity to meet people, make new friends, to be a “grandma” to kids.
- It is a chance to help people and feel needed.
- It provides the satisfaction that comes from contributing acquired skills.
- It offers a way to learn new skills and activities.
- It is an opportunity to work with children.
- It is enjoyable or fun.
- It satisfies a sense of duty to the community.

FUTURE INTEREST IN VOLUNTEER AND SERVICE WORK IN GENERAL

Knowing this senior cohort’s intentions with respect to whether their involvement in volunteering will change in any way in the near future is key for policy planning. Exhibit 9 below shows that about one third (33.7%) of these seniors plan to increase their involvement in volunteering in the upcoming two to three years.

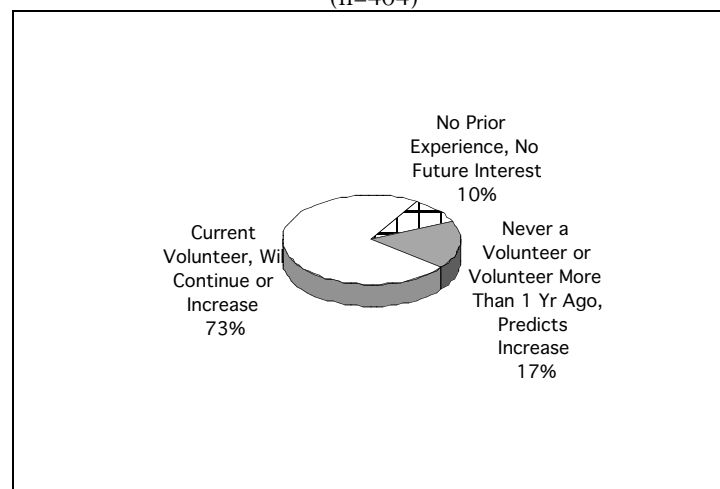


Because the proportion of California seniors who predict their involvement with volunteering will increase in the upcoming two to three years is of particular interest to service planners and policymakers, we provide the margin of error for this statistic (at the 95% confidence level), which is $\pm 4.2\%$.

Who are the seniors predicting their involvement with volunteering will increase? While the details below provide some of the characteristics that seniors who say their involvement will increase are more likely to have, we conducted a targeted investigation that integrates past volunteer experience with predicted future involvement.

To do so, we segmented senior participants into three categories: 1) those who have never volunteered and indicate no future interest in volunteering; 2) those who never volunteered or who have volunteered more than one year ago and who indicate their involvement will increase (i.e., representing new or returning volunteers); and 3) those who are current volunteers and indicate their involvement will either stay the same or increase (i.e., representing continuing volunteers). See Exhibit 8 below.

Exhibit 10
Proportion Of Seniors Who Will Increase Volunteering In The Future
And Their Volunteer Experience
 (n=404)



As illustrated in Exhibit 8, almost three quarters (72.5%) of seniors are current volunteers who expect their volunteer involvement to continue or increase. Another almost one fifth (17.1%) of seniors, who have never volunteered or volunteered more than one year ago, also predict an increase in their volunteer activity. Only ten percent (10.4%) of seniors surveyed have no prior volunteer experience and do not expect to volunteer in the future.

When we examined this constructed group by characteristics, we found that the generational age group to which a senior belongs more consistently than retirement status predicts what group s/he will be in. Baby boom generation seniors (ages 50-54 years) are the least likely (2.6%) compared to seniors ages 55-64 years (10.4%) and those over the age of 65 years (13.6%) to be part of the group that has never volunteered and has no future interest in volunteering. Baby boomers are also the most likely (81.6%) compared to seniors ages 55-64 years (70.8%) and those over the age of 65 years (70.5%) to be in the group that is now volunteering and will either continue or increase their involvement (χ^2 , $p=.058$).

Characteristics Related to Projected Involvement With Volunteering

Prior level of education and health status also appear to be related to seniors' volunteer experience and whether they anticipate their level of involvement in volunteering in the upcoming 2-3 years will increase.

- **Education.** As educational level increases, so does the likelihood that senior participants have volunteered in the past and intend to continue or increase their involvement in the future. About half

(52.0%) of seniors with a high school education are current volunteers with intentions of continuing or increasing their involvement compared to 68.1% of those with college education and 88.6% of those with some graduate school education (χ^2 , $p < .001$).

- **Health.** Seniors who report their health is “very good” (81.4%) are the most likely to be current volunteers with intentions of continuing or increasing their involvement compared to those who say their health is “good” (69.6%) and those who say their health is “not so good” (44.4%) (χ^2 , $p < .001$).

FUTURE INTEREST IN SPECIFIC PROGRAM AREAS

Identifying the specific program areas or causes that may be of particular interest to senior volunteers can shape the direction of volunteer recruiting efforts and other planning for volunteer involvement.

Exhibit 11
Future Interest in Volunteer Involvement With Types of
Programs or Causes
Among Seniors Overall and Seniors Indicating Their Involvement
With Volunteering Will Increase

Program or Cause	Seniors Overall		Seniors Indicating Their Involvement With Volunteering Will Increase	
	Number Responding	% Interested	Number Responding	% Interested
Education Programs	412	37.9%	138	56.5%
Programs For Community Safety	402	37.6%	138	52.9%
Community Issues	406	36.2%	130	48.5%
Environmental Programs	414	35.5%	140	45.0%
Seniors Programs	406	35.5%	134	47.8%
Arts/Cultural Programs	414	35.3%	140	45.7%
Programs For Animals	406	32.0%	134	38.8%
Adult Programs	406	30.0%	132	47.0%
Children/Youth Programs	412	28.4%	138	45.7%
Social Service Programs	402	28.1%	136	41.9%
Health Services Programs	398	25.1%	138	31.9%
Religious/Church Programs	440	19.3%	150	26.0%
Political Advocacy/Issues	400	16.8%	132	18.9%
Political Parties/Candidates	408	14.0%	132	38.8%

Seniors overall express a consistently high level of interest in a number of program areas. In particular, education programs (37.9%), programs for community safety (37.6%), and programs related to community issues (36.2%) are of greatest interest to seniors, closely followed by seniors programs (35.5%), environmental programs (35.5%), and arts/cultural programs (35.5%). Programs specifically dedicated to children and youth are of slightly lesser interest (28.4%) to respondents.

Among seniors who expect their volunteer involvement to increase, program areas of the highest interest include education programs (56.5%), programs for community safety (52.9%), and programs related to community issues (48.5%); the picture looks much the same as with seniors overall. Those programs of next greatest interest to seniors who expect to increase their volunteering include seniors programs (47.8%), adult programs (47.0%), arts/cultural programs (45.7%), and programs dedicated to children and youth (45.7%). Programs dedicated to children and youth are of greater interest among volunteers who intend to increase their volunteer involvement than among seniors overall.

What Characteristics Are Related to Seniors' Interest In Working With Children and Youth?

Several characteristics are related to whether seniors are interested in working with children and youth. Significant characteristics related to this interest include gender, income, health status, and religious affiliation.

- **Gender.** Women are more likely to express interest in volunteering with children or youth (32.4%) compared with men (22.7%) (χ^2 , $p=.031$).
- **Income.** Seniors with moderate/high income are the most likely to be interested in volunteering with children or youth programs (32.9%) compared with other seniors (25.0% of low income seniors and 18.8% of very low income seniors; χ^2 , $p=.002$).
- **Health Status.** Seniors who describe themselves as “very healthy” (36.3%) are the most likely to be interested in volunteering with children or youth programs compared with other seniors (26.7% of seniors with “good” health and 9.5% of seniors whose health is “not so good”; χ^2 , $p<.001$).
- **Religious Affiliation.** Seniors who are affiliated with a church, temple, mosque, or other religious organization (33.5%) are the most likely to be interested in volunteering with children or youth programs compared with other seniors (25.0% of seniors with past affiliation and 22.9% of seniors who have never been affiliated; χ^2 , $p<.001$).

Most senior volunteer focus group participants already are working with children and youth (through RSVP and foster grandparents programs), though some volunteer with other seniors and others with general adult populations. Most who prefer to work with children indicate that they prefer to work with

I wanted to work with seniors, but I never did. Youth are the future. We are moving off the scene.
–San Francisco Bay Area Participant

I could never work with babies or old people.
–San Francisco Bay Area Participant

Younger kids are better [to volunteer with], like 10 year olds. They know a lot, what's going on, and you can communicate.
–Southern California Participant

I feel like I just started yesterday [after 22 years of volunteering]. I talk, visit, and laugh [with the kids]. Kids ask, ‘Grandma, can I take you home with me?’
–Central California Participant

How many [youth] have we saved from going to the wrong way just by listening to what we have to say? We've been through it. We've lived it.... Your life is in front of you.
–Central California Participant

If the subject is interesting and it's something you want to do, I don't care if [they're] old or young.
–Southern California Participant

...people you visit with are so precious and they have a certain need to speak with other elders.
–Central California Participant

younger children (under age 12). They believe that younger children are more open to learning from seniors than teenagers. Moreover, many participants indicated that they prefer not to work with other seniors or in “depressing” hospice or hospital settings, although there was some disagreement on this. In two of the three volunteer focus groups, participants specifically identified a preference for volunteering with people with disabilities.

Focus group participants who are not formal volunteers also expressed interest in volunteering with people with mental disabilities, prison inmates, as well as seniors and youth.

FUTURE INTEREST IN SPECIFIC VOLUNTEER ACTIVITIES

The interest of seniors in being involved with specific kinds of volunteer activities in the future may determine strategies for developing meaningful and rewarding volunteer participation. While not necessarily specific to a particular population (i.e., youth or adults), these activities vary in the types of skills and abilities involved for the volunteer. Among seniors who indicate that their involvement with volunteering will increase, looking at their interest in specific volunteer activities may determine the direction of their future participation.

Exhibit 12
Future Interest in Volunteer Involvement With Specific
Volunteer Activities
Among Seniors Overall and Seniors Indicating Their Involvement
With Volunteering Will Increase

Program or Cause	Seniors Overall		Seniors Indicating Their Involvement With Volunteering Will Increase	
	Number Responding	% Interested	Number Responding	% Interested
Reading With Children/Adults	426	39.4%	144	54.2%
Doing Clean-up/Beautification Projects	432	33.6%	142	44.4%
Visiting Isolated People	424	31.8%	146	44.5%
Teaching/Tutoring	428	31.8%	144	43.1%
Being a Mentor	418	29.9%	138	42.8%
Delivering Groceries/Meals	434	29.0%	146	41.1%
Counseling	428	29.0%	144	37.5%
Driving People to Appointments	428	28.0%	138	33.3%
Doing Office Work	428	27.8%	146	40.4%
Serving on a Board/Committee	436	20.6%	144	29.2%
Organizing Events/Activities	432	18.3%	146	22.6%
Helping People With Daily Tasks	422	16.4%	144	21.5%

	Seniors Overall		Seniors Indicating Their Involvement With Volunteering Will Increase	
Creating Art	414	14.5%	140	18.6%
Writing Articles/Essays	422	13.7%	140	22.9%
Providing Childcare	420	10.5%	140	15.7%
Fundraising	420	6.4%	138	8.0%

Notably, most respondents among seniors overall expressed interest in activities that involve reading with either children or adults (39.4%). Doing clean-up/beautification project (33.6%), teaching or tutoring (31.8%), and being a mentor (29.9%) also engaged their interest. Of the least interest are providing childcare (10.5%) and fundraising (6.3%) activities.

Similarly, among seniors indicating their involvement with volunteering will increase, respondents are interested in activities that involve reading with either children or adults (54.2%), teaching or tutoring (43.1%), or being a mentor (42.8%). Other activities of the most interest include visiting isolated people (44.5%) and clean-up or beautification projects (44.4%). As among seniors overall, those who plan to increase their volunteering are least interested in providing childcare (15.7%) and fundraising (8.0%).

Differences in Future Interest in Reading with Children or Adults By Characteristics

A number of characteristics are related to whether seniors report future interest in reading with children or adults as a volunteer. Specifically, interest in this activity varies significantly by age, gender, and religious affiliation. The following discusses in detail how future interest differs by these traits.

- **Age.** Seniors ages 50-54 years (59.1%) are the most likely to say they are interested in reading with children or adults as a volunteer in the future (compared with 37.6% of seniors ages 55-64 years and 31.1% of seniors ages 65 and over; χ^2 , $p < .001$).
- **Gender.** Women (49.8%) are more likely than men (23.3%) to say they are interested in reading with children or adults in the future (χ^2 , $p < .001$).
- **Religious Affiliation.** Those who are currently affiliated with a church, temple, mosque or other religious organization (50.0%) are more likely to say they are interested in reading with children or adults in the future, as compared to those who have been affiliated in the past (34.4%) and those never affiliated (24.0%) (χ^2 , $p < .001$).

Differences in Future Interest in Teaching or Tutoring By Characteristics

A number of characteristics are related to whether seniors report future interest in teaching or tutoring. As with interest in reading with children and adults described above, interest in this activity varies significantly by age, gender, and religious affiliation.

- **Age.** Seniors ages 50-54 years (50.0%) are the most likely to say they are interested in teaching or tutoring in the future (compared with 31.2% of seniors ages 55-64 years and 22.7% of seniors ages 65 and over; χ^2 , $p < .001$).

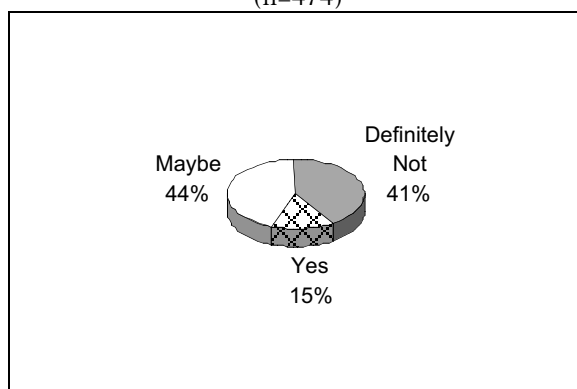
- **Gender.** Women (36.2%) are more likely than men (24.8%) to say they are interested in teaching or tutoring in the future (χ^2 , $p=.003$).
- **Religious Affiliation.** Those who are currently affiliated with a church, temple, mosque or other religious organization (35.1%) and those who have been affiliated with a church or religious group in the past (34.3%) are more likely than those who have never been affiliated (22.4%) to say they are interested in teaching or tutoring in the future (χ^2 , $p<.001$).

FUTURE INTEREST IN SIGNIFICANT VOLUNTEER COMMITMENTS

Respondents' potential interest in a long-term volunteer commitment, with the example of a full or part-time mentoring or tutoring activity, may provide important information about the likelihood of success of longer-term volunteer programs that require a significant commitment over time.

As revealed by Exhibit 13 below, most respondents would be interested in such a program, with 43.9% indicating that they might be interested and 14.8% indicating a definite interest.

Exhibit 13
Would You Consider Making A Full-Time or Part-Time 1-Year
Volunteer Commitment, For Example, Working With a
Community-Based Organization Mentoring or Tutoring Children?
 (n=474)



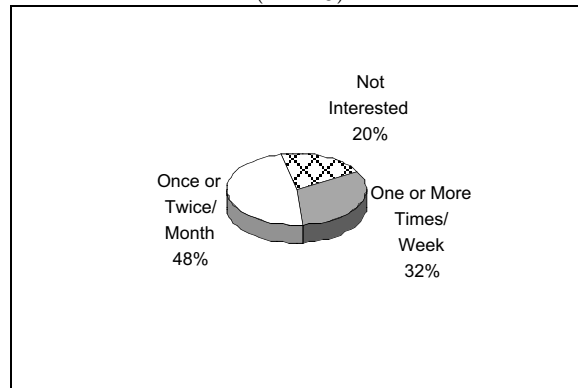
What Groups of Seniors Are More Likely to Say They Would Consider Making a Full- or Part-Time Volunteer Commitment?

Whether seniors report that they would consider making a full- or part-time volunteer commitment is related to age and gender.

- **Age.** Seniors ages 50-54 years (21.3%) are the most likely to consider making a full- or part-time volunteer commitment (compared to 16.3% of seniors ages 55-64 years and 9.6% of seniors ages 65 and over; χ^2 , $p=.003$).
- **Gender.** Women (17.5%) are more likely than men (10.8%) to say "Yes" they would make a full- or part-time volunteer commitment (χ^2 , $p=.004$).

Preferences among seniors who are interested in volunteering in the future include the frequency of their volunteer activities per week or per month.

Exhibit 14
If You Were to Volunteer in The Future,
How Often Would You Be Interested in Volunteering?
(n=476)



Almost half of respondents would be interested in volunteering once or twice per month (47.9%), while over a third would be interested in volunteering one or more times per week (31.9%).

How Does Frequency of Future Volunteer Efforts Differ By Characteristics?

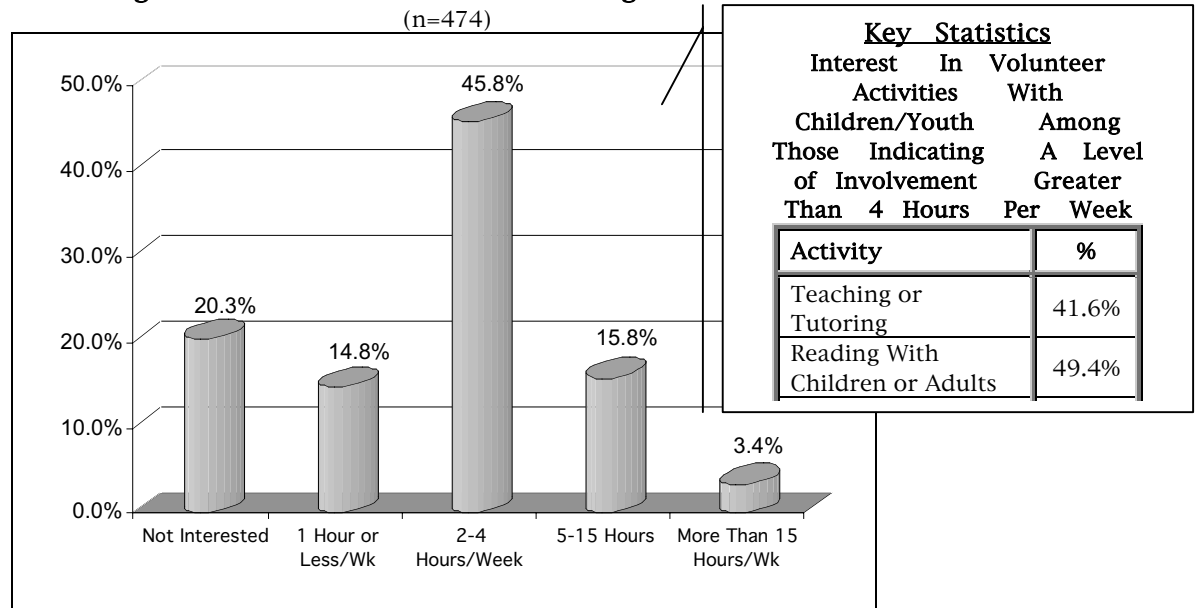
The level of frequency these seniors say they are interested in volunteering in the future varies by age, gender, race/ethnicity, and income as follows:

- **Age.** Seniors ages 65-69 years (41.9%) are more likely than seniors overall (32.2%) to say they are interested in volunteering one or more times a week (χ^2 , $p<.001$).
- **Gender.** Women (41.8%) are more than twice as likely as men (17.5%) to say they are interested in volunteering one or more times a week (χ^2 , $p<.001$).
- **Race/Ethnicity.** African Americans (50.0%) are more likely than seniors overall (31.7%) to say they are interested in volunteering one or more times a week (χ^2 , $p=.035$).
- **Income.** Seniors with very low income (40.5%) are more likely than seniors overall (31.1%) to say they are interested in volunteering one or more times a week (χ^2 , $p<.001$).

Similarly, the number of hours per week on average that seniors might be interested in volunteering in the future can influence the structure and type of volunteer activities they should be offered.

As indicated by Exhibit 15 below, the most respondents would prefer to volunteer 2-4 hours per week (45.8%). This response is far and above the most preferred time commitment, particularly in comparison to those interested in volunteering more than 15 hours per week (3.4%).

Exhibit 15
If You Were to Volunteer in The Future, How Many Hours Would You Be Willing To Contribute On Average Each Week?

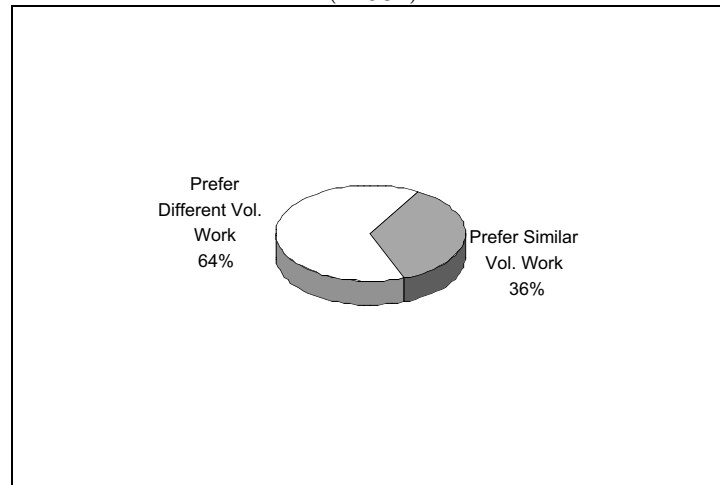


Compared to the 3.4% of seniors overall who say they are interested in volunteering 15 or more hours per week, retired seniors (8.9%) are more likely to be interested in volunteer service at this level of commitment.

Among the almost one quarter (24.1%) of seniors interested in a level of involvement greater than four hours per week, almost half (49.4%) are interested in activities that involve reading with children or adults, while 41.6% are interested in teaching or tutoring and 38.4% are interested in being a mentor. The question of whether seniors will prefer volunteer activities that are similar to or different from their career work may also determine the planning and messages of volunteer programs.

As indicated in Exhibit 16 below, almost two-thirds of respondents prefer volunteer work that is different from their career work (64%).

Exhibit 16 **Preference For Volunteer Work That Is Similar To or Different** **From Career Work** (n=384)



The generation to which a participant belongs is related to his or her desire to do volunteer work that is similar to or different from their career work. Nearly three-quarters (70.0%) of participants ages 50-54 years say they want to do volunteer work that is different from their career work compared to 62.5% of those ages 55-64 years and 64.3% of those over the age of 65 years (χ^2 , $p=.253$).

In some cases... [potential senior volunteers] might want to do a whole new ballgame, change their focus in life.

-Southern California Participant

I like the challenge of doing things different. I'm not too fond of routines, so I do various things.

-Southern California Participant

Focus group findings contradict these results. It is notable that many senior volunteers in the focus groups who are volunteering with children previously worked as teachers and mentioned this similar work experience as one of the motivating factors in volunteering with youth in educational settings. Still others, consistent with the survey findings, mentioned the appeal of doing something totally different from their career.

INCENTIVES AND ENCOURAGEMENT

Among the most important aspects of volunteer program planning is determining what may motivate or encourage potential volunteers to start volunteering and current volunteers to increase or continue their volunteer work. Exhibit 17 below provides the proportion of respondents who indicate that various incentives or methods of encouragement would motivate them to volunteer if they have not previously, or volunteer more if they already do. Exhibit 17 also compares the proportion of seniors who report that they "maybe" are interested in a significant volunteer commitment, who would respond each of these incentives.

Exhibit 17

Proportion of Participating California Seniors Indicating Specific Incentives That Would Encourage Them To Start or Do More Volunteer Work: Overall, Among Seniors 50-54 Years, and Among Those Indicating They Are “Maybe” Interested In A Significant Volunteer Commitment

<i>I Would Start or Do More Volunteer Work...</i>	Seniors Overall		Seniors 50-54 Years		Seniors “Maybe” Interested In Significant Commitment	
	# Responding	% “True”	# Responding	% “True”	# Responding	% “True”
If I Knew The Volunteer Opportunity Was Meaningful, Or Made A Difference in People’s Lives	458	74.2 %	92	78.3 %	196	87.8%
If I Found An Organization With Values and A Mission I Truly Support	458	73.8 %	90	86.7 %	196	82.7%
If I Knew I Had The Skills Needed To Do A Good Job	458	59.8 %	92	63.0 %	196	74.5%
If I Got To Meet Interesting People and Make New Friends	450	55.8 %	88	68.2 %	188	65.4%
If I Knew The Volunteer Environment Was Both Safe and Pleasant	448	53.3 %	92	60.9 %	190	67.9%
If The Volunteer Opportunity Was Offered Or Needed By An Organization Or Group I Already Belong To	450	50.9 %	92	54.3 %	190	57.4%
If The Organization Trained Me To Do The Work	452	49.1 %	92	65.2 %	196	62.2%
If The Organization That Needed Help Was One That Had, In The Past, Helped Me Or Someone I Love	448	48.2 %	90	64.4 %	188	56.4%
If I Weren’t So Busy With Work	460	47.6 %	94	78.7 %	196	57.7%
If I Could Be Given Clear and Specific Tasks To Do	452	46.9 %	90	55.6 %	194	58.8%
If The Volunteer Opportunity Had Convenient Hours	460	44.8 %	92	56.5 %	194	60.8%
If I Weren’t So Busy With Family	456	39.0 %	94	63.8 %	196	44.9%
If I Had Better Transportation Or If The Volunteer Opportunity Was Closer To Where I Live	452	37.6 %	92	45.7 %	186	53.7%
If I Were Given Assistance Finding Out About Volunteer Opportunities	450	35.3 %	90	48.9 %	188	50.5%

	Seniors Overall		Seniors 50-54 Years		Seniors "Maybe" Interested In Significant Commitment	
If I Were Recognized Or Appreciated For My Work As A Volunteer	452	33.8 %	90	37.8 %	188	47.3%
If I Knew Someone Else Who Also Worked Or Volunteered There	448	32.8 %	88	50.0 %	186	41.4%
If I Received a Regular Stipend	452	26.1 %	88	40.9 %	188	35.1%
If I Were In Better Health	454	24.9 %	90	22.2 %	188	23.9%
If I Received Some Form of Return, e.g., Meals, Prescription Drug Discounts, Token Payments, etc. in Return For My Time	458	24.5 %	92	34.8 %	194	34.0%
If Organizations Improved Their "Attitudes" Toward Volunteers	452	23.2 %	90	31.1 %	188	33.5%
If I Were Given An Educational Award or Scholarship That Could Be Transferred to Others Such as Children or Grandchildren	450	21.1 %	90	35.6 %	188	23.9%
If I Were Given Special Accommodation For Physical Disabilities	450	8.7%	90	11.1 %	188	10.1%

Almost three quarters of California seniors would be encouraged to volunteer, "If I knew the volunteer opportunity was meaningful or made a difference in people's lives," (74.2%). Similarly, trust in the significance and goals of the place of volunteer would encourage 73.8% of seniors to volunteer, "If I found an organization with values and a mission that I truly support." Senior volunteers want to find volunteer opportunities that are meaningful to themselves and others.

Other incentives of particular importance include the reassurance that the volunteer's skills are relevant (59.8%), the opportunity to meet people and make friends (55.8%), a safe and pleasant place of volunteer (53.5%), opportunities to volunteer with an organization the volunteer belongs to already (50.9%), volunteer skills training (49.1%), and previous

I think a lot of seniors would volunteer if they had transportation. Be it a bus or somebody would come and get them, like a carpool or something.

–Central California Participant

Even if you have a car, the prices of gas will limit the places you go to.

–Central California Participant

I don't have a car but use public transit. Often my choice of where to volunteer is limited, made according to transit. I could make a greater number of commitments if transportation was easier. I now tend, when a volunteer opportunity comes up, to think of it solely in terms of how can I get there.

–San Francisco Bay Area Participant

I have a car, but if I have to go to a volunteer situation, the travel time adds to the overall commitment time. This will influence my choice of location.

–San Francisco Bay Area Participant

I was looking for a place that was closest to where I lived.... The people there were great and it was close to home and I enjoyed every minute of it.... Location had a big thing to do with it... and convenience.

–Southern California Participant

experience with the place or organization of volunteer (48.2%).

Of slightly less importance according to survey findings are the following: time available away from work (47.6%) and family (39.0%) activities, clear and specific volunteer tasks (46.9%) and convenient hours (44.8%), improved transportation to the volunteer location or a location was closer to home (37.6%), assistance with getting information about volunteering (35.3%), volunteer appreciation (33.8%), and knowing someone at the volunteer location (32.8%).

Of least importance to encouraging or maintaining volunteers are elements of reward or financial appreciation and physical health or ability. Aspects of reward or financial appreciation include the following: receiving a stipend (26.1%) or some other form of return such as meals, prescription drug tokens (24.5%), and receiving an educational award or scholarship (21.1%). Aspects of physical ability include good health (24.9%) and special accommodation for physical disabilities (8.7%).

Findings for seniors who report that they “maybe” are interested in a significant volunteer commitment are similar to those for seniors overall, particularly for the incentives that are of the most interest. Most of the seniors who might be interested in a significant volunteer experience would be encouraged to volunteer, “If I knew the volunteer opportunity was meaningful or made a difference in people’s lives,” (87.8%). Similarly, trust in the significance and goals of the place of volunteer would encourage 82.7% of this group of seniors to volunteer, “If I found an organization with values and a mission that I truly support.” As with seniors overall, those willing to consider a significant seek meaningful opportunities.

Other incentives of particular importance include the reassurance that the volunteer’s skills are relevant (74.5%), a safe and pleasant place of volunteer (67.9%), and the opportunity to meet people and make friends (65.4%). Incentives of greater importance to this group than to seniors overall include volunteer skills training (62.2%) and convenient hours of the volunteer opportunity (60.8%).

Focus group participants mentioned a number of incentives and barriers to volunteering. Most strikingly, in contradiction to the survey findings, transportation was the most frequently cited obstacle mentioned by volunteer seniors in all three of the focus groups. Especially in the rural settings of Central California, there is a lack of adequate public transit. In the urban settings, volunteer participants mentioned the crowding or inconvenience of public transit. Another common transportation problem was the price of gas for driving. For people on fixed incomes, rising gas prices limits their ability to drive to their volunteer sites. Travel time is a related concern. One solution offered was to have more volunteer opportunities in people’s neighborhoods.

The reasons that focus group participants gave for why they volunteer, which are described above, confirm many of the survey findings about incentives. In addition, many volunteers described the importance of their “comfort level” in selecting a particular volunteer site where new recruits and long-time volunteers are treated with the same respect and courtesy, and where there are opportunities to be creative and learn new things. In the San Francisco Bay Area focus groups, participants expressed great enthusiasm for education credits or a transferable scholarship.

If I didn't enjoy it, I wouldn't be volunteering. I have to enjoy what I'm doing to stay.

–Southern California Participant

You still need a pat on the back once in a while. I think that's very important to every one of us.

–Central California Participant

Sometimes when you're older, people treat you like you were just born, you don't know anything. You get to a certain age [and people assume] if you've got a headache that it's rheumatism or arthritis, that you can't hear or see.

–San Francisco Bay Area Participant

Other barriers mentioned by focus group participants include having enough time to volunteer (in addition to current volunteer commitments), neighborhood safety, and stereotypes of older people held by staff at volunteer sites.

There was general agreement among San Francisco Bay Area senior volunteers that they would not volunteer in the evenings or at night because of concerns about safety.

They specifically commented that in terms of the time of day when they want to volunteer, they would rather volunteer during the daylight hours.

I won't volunteer in the evenings, at night. Seniors are vulnerable.

-San Francisco Bay Area Participant

TAILORING STRATEGIES AND MESSAGES TO ENGAGE SENIORS WHO ARE AT DIFFERENT STAGES OF READINESS TO VOLUNTEER

Messages and strategies to engage seniors who are at different stages of readiness with respect to volunteering must be tailored if they are to be reached successfully.² One model of how people change their behaviors, the Stages of Behavior Change Model, proposes that individuals generally fall into five categories with respect to how oriented they are to changing a given behavior:

- *Pre-contemplation*, referring to individuals who have never thought about volunteering and those who may not even know that there is a demand for volunteers;
- *Contemplation*, including individuals who have never volunteered—or last volunteered more than one year ago—and who indicate they are thinking about volunteering in the future;
- *Ready for action*, including those who are thinking about volunteering and are on the verge of doing so;
- *Action*, referring to individuals who have made a commitment to volunteer and may have already taken steps to initiate a volunteer opportunity or may have volunteered recently for the first time; and
- *Maintenance*, referring to current volunteers.

The following findings from this assessment are instructive for tailoring messages to seniors who fall into the first three of the five stages of behaviors change. These seniors have the least prior experience with, and inclination to, volunteer. Recommended strategies differ depending on how far along in the stages of behavior change they are.

Pre-contemplation

The following findings from this California Assessment of Seniors and Service focus on the reports of seniors participants who have never volunteered and do not indicate any future intention of volunteering. These seniors who have never even considered volunteering indicate that the following incentives may encourage them to do so:

- If they find an organization with values and a mission they support (66.3%);
- If they know it is meaningful and making a difference in people's lives (61.4%);
- If they know the volunteer environment is both safe and pleasant (56.6%); and
- If the organization they will help had helped someone they know in the past (41.0%).

These findings support what Cheang and Braun, authors of the Hawai'i study, conclude in terms of how to engage seniors in the pre-contemplation stage: "the strategy to get non-volunteers to think about (and seriously consider doing) volunteer work is to increase their awareness that there is a need for volunteers. More importantly, efforts to increase non-volunteer's awareness can be more effective if the information provided to them about volunteer opportunities can be more proactive, personalized, and provided in more detail versus in general terms."

Contemplation

Seniors who have never volunteered but are contemplating volunteering indicate that the following incentives may encourage them to do so:

- If they know they have the skills to do a good job (55.3%);
- If the organization trains them to do the work (52.9%);
- If they will get to meet interesting people and make new friends (50.6%);
- If the volunteer opportunity has convenient hours (49.4%); and

² We credit the authors and architects of the Hawai'i Community Foundation-sponsored study *Senior Volunteers As Assets: A Statewide Survey* (January 2001) with developing the application of this theoretical framework to volunteering and community service. The report authors—Michael Cheang, DrPH and Kathryn Braun, DrPH—are with the Center on Aging, Office of Public Health Studies, School of Medicine, University of Hawai'i at Manoa.

- If they receive assistance finding out about volunteer opportunities (43.5%);

These seniors need to feel comfortable that they can fulfill the responsibilities of a volunteer commitment—a comfort level that organizations can promote by assuring them that they will receive training and support in the process. They are attracted by the prospect of volunteer service as a way of socializing, but they are concerned about practical issues such as the convenience of a volunteer activity schedule. Ultimately, these are seniors for whom outreach that provides information about volunteer opportunities can be most effective.

Ready for Action

Seniors who are ready to begin volunteering indicate that the following incentives may encourage them to do so:

- If they are given clear and specific tasks to do (52.9%);
- If they have better transportation to get to a volunteer opportunity or the opportunity is close to where they live (44.6%); and
- If they are given a stipend or an educational award or scholarship that could be transferred to others such as children or grandchildren (32.9%).

Seniors who are on the verge of deciding to volunteer are likely to be encouraged to take the step if they are assured that their volunteer responsibilities will be clearly laid out, if practical barriers such as transportation are addressed, and if they were offered an incentive such as an educational award or scholarship.

By tailoring messages and strategies to the various stages of readiness at which seniors might be, policymakers and program planners can maximize their effectiveness in engaging seniors in volunteering and community service.



CONCLUSION

The California Assessment of Seniors and Service report reveals a clearer picture than previously has been available of the current generation of seniors and service in California, and provides a glimpse of future generations of senior volunteers. California seniors already have substantial experience with volunteering; furthermore, they express interest in continuing and increasing their involvement with community service in the future.

The oldest members of the baby boom generation, currently ages 50-54 years, plan to increase their volunteer activities, and may be encouraged to do so through various incentives. Among seniors overall, it appears that there is significant, positive interest in intergenerational activities relative to other activities, to the extent that organization of intergenerational community service will be a valuable undertaking.

Although this report elicits information about a fairly representative group of California seniors in many respects, the following populations merit further qualitative research with regards to community service:

- Senior men
- Seniors in communities of color, especially Latino/a seniors
- Seniors with no volunteer experience

In addition, these data imply that age/generation may be a more powerful predictor of attitudes and behavior than retirement status. This suggests that research with a primary focus on representation across generational groups could yield additional insights.

California seniors present policymakers and service planners with an exciting opportunity. Changing demographics and the likelihood that volunteerism among seniors will increase in the future require creative strategies to facilitate their engagement in community service. Volunteering and community service provides a proactive, mutually-beneficial venue for seniors to make their unique contributions.

California communities that actively involve seniors—particularly in ways that bring generations together—will benefit from their skills, experience, and knowledge. Through their service, seniors model what we all can do to create communities in California that are predicated on shared responsibility and a commitment to each other.



APPENDIX A

Characteristics of Participating California Seniors

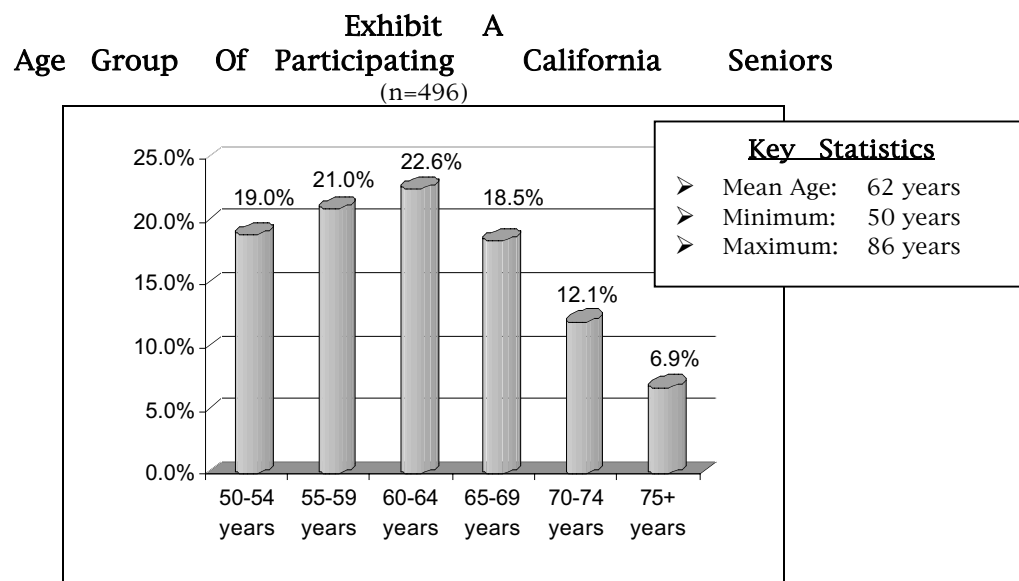
CHARACTERISTICS OF PARTICIPATING CALIFORNIA SENIORS

This section describes the survey respondents in terms of their:

- Demographic characteristics; and
- Retirement and work status.

DEMOGRAPHIC CHARACTERISTICS

Seniors between the ages of 50 and 86 years responded to the survey. The mean age of respondents is 62 years. Exhibit A below presents the specific proportion of seniors in each age group.



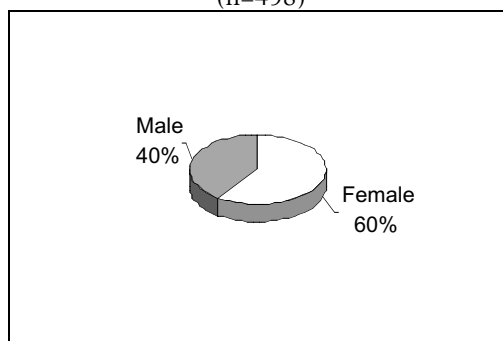
Around one fifth of senior participants fall into each of the younger four age groups: 19.0% are 50-54 years, 21.0% are 55-59 years, 22.6% are 60-64 years, and 18.6% are 65-69 years. Just over one tenth (12.1%) are 70-74 years and 6.9% are 75 years or over.

For the purposes of some of the multi-variate data analysis, we collapsed the six age groups presented above into three age groups, roughly representing “generations” of older adults for whom planning for service involvement might differ. These three groups include: 1) 50-54 years (representing 19.0% of participants); 2) 55-64 years (43.5% of participants); and 3) 65 years and over (37.5%). Those in the 50-54 years age group are members of the baby boom generation; as they age, the proportion of older people in the US population is increasing. Those in the 65 years and over group are in the current generation of seniors. Thus, participants may be described as members of at least two separate “generations” with distinct characteristics.

A greater proportion of seniors ages 50-54 years—those in the baby boom generation—responded from the San Francisco/Bay Area and Northern regions as compared to other California regions. The fewest are in the Southern region and Central regions. Because of this slightly uneven distribution across regions, we highlight relationships with age rather than region when both emerge as positive correlations with other findings in the analysis.

Exhibit B below provides the gender breakdown of participating seniors.

Exhibit B
Gender Of Participating California Seniors
 (n=498)

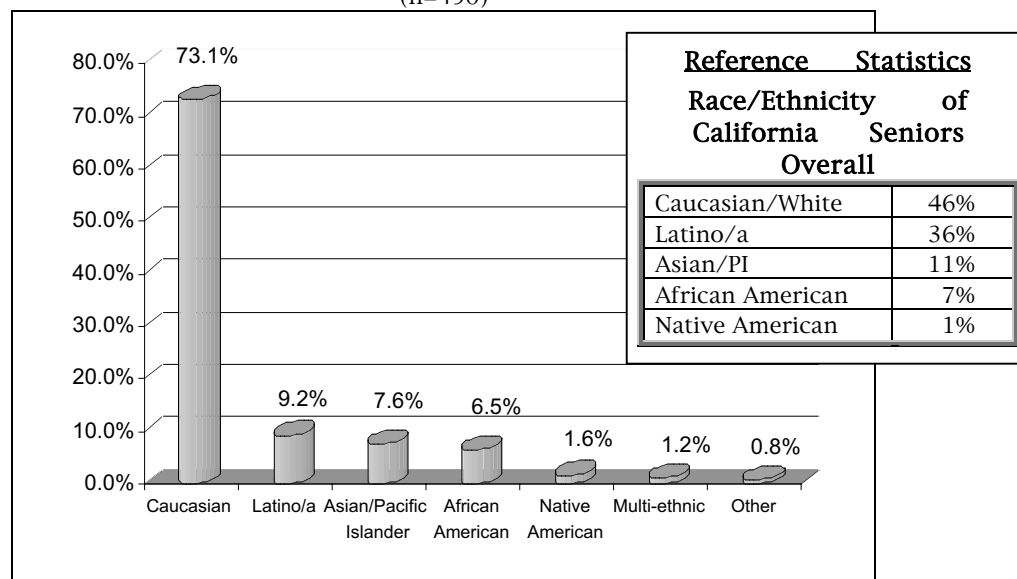


Senior women are more likely than men to have responded to the survey. Sixty percent (59.6%) of survey participants are female, although females comprise 50% of the senior population aged 50-75 years in California. Since women are known to be proportionately more involved in volunteering than men, their over-representation in the survey sample is not surprising.

The gender distribution of participating seniors by region indicates that females from the Southern and San Francisco/Bay Area regions are more likely than male participants in their respective regions to have responded to the survey. Only in the Central region can more male than female participants be found. As discussed above with age, this slightly uneven distribution across regions means that relationships with gender rather than region are more reliable when both emerge as positive correlations with other findings in the analysis.

Exhibit C provides the racial and ethnic background of survey participants.

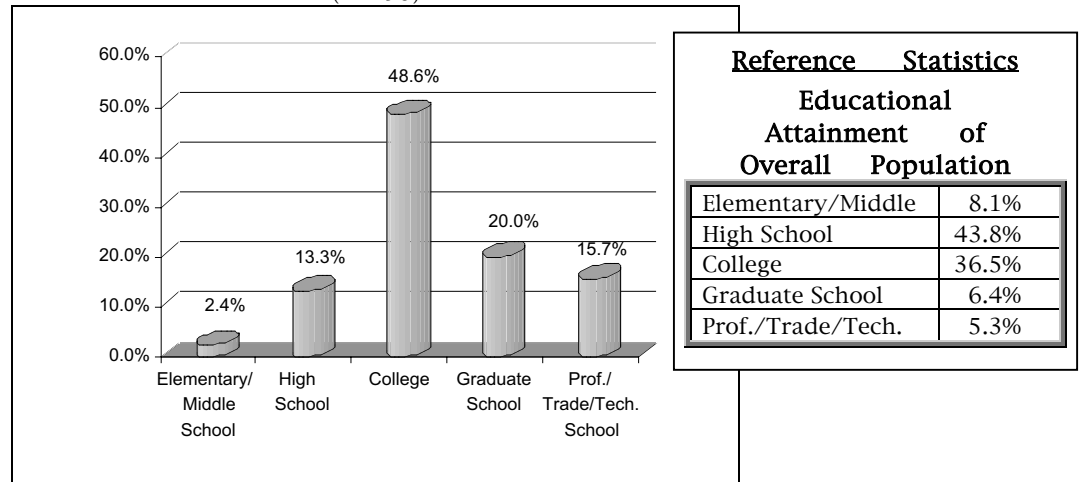
Exhibit C
Race/Ethnicity Of Participating California Seniors
 (n=490)



Comparison of survey participants' race/ethnicity to the overall population of California³ seniors reveals an important discrepancy. Latino/a seniors are under-represented in the sample (comprising 9.2% compared to 36% of the overall senior population) while Caucasian seniors are over-represented (comprising 73.1% compared to 46% of the overall senior population).

The highest level of education achieved by participating seniors can be seen in Exhibit D.

Exhibit D
Highest Level Of Education Achieved Among Participating
California Seniors
 (n=496)



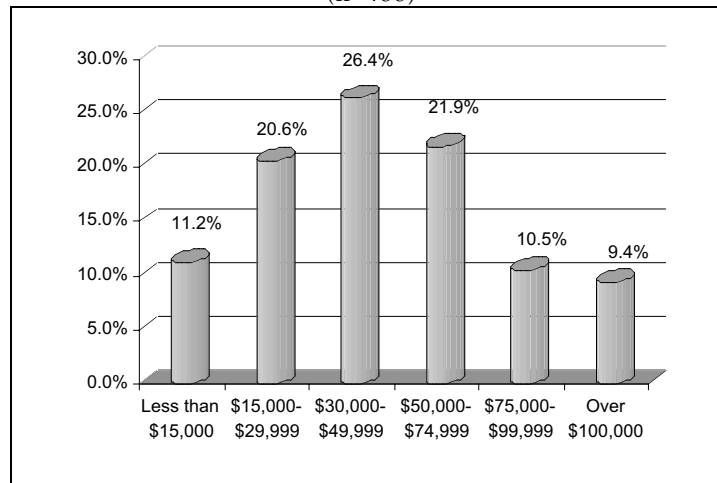
About half (48.6%) of participating seniors have attended college and another one fifth (20.0%) have attended graduate school. Compared to the overall population, this group of seniors has a higher level of educational attainment.⁴

Exhibit E displays overall household income in the past year, as reported by respondents.

³ Source: RAND California: An Online Source for California and US Statistics: <http://ca.rand.org/>.

⁴ Source: United States Census Bureau, March 1996 Population Survey.

Exhibit E
Self-Reported Household Income In The Past Year
(n=466)



The distribution of household income follows a normal, bell-shaped distribution, with the smallest proportions having the lowest and highest amounts of annual income, and most falling somewhere in the middle. Just over one tenth (11.2%) of participating seniors have less than \$15,000 in annual income, about one fifth (20.6%) have \$15,000-\$29,999 in annual income, and about one quarter (26.4%) have \$30,000-\$49,999 in annual income. Proportions trail off from here, as about one fifth (21.9%) have \$50,000-\$74,999 in annual income, and about one tenth each have \$75,000-\$99,999 (10.5%) and over \$100,000 (9.4%) in annual income.

Household income differs according to the age group of participating seniors. Exhibit F below shows that, in general, older seniors are more likely to be in the lower income groups as compared to younger seniors, and that conversely younger seniors are more likely than older seniors to be in the higher income groups (χ^2 , $p < .001$).

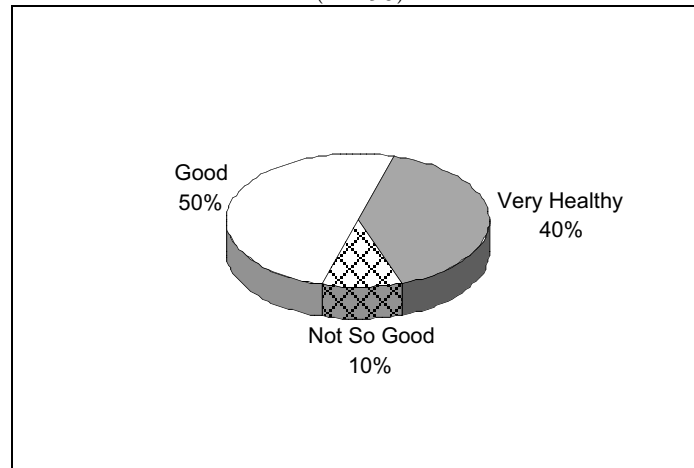
Exhibit F
Self-Reported Household Income In The Past Year, By Age Group
(n=462)

Age Group	Less than \$15,000	\$15,000-\$29,999	\$30,000-\$49,999	\$50,000-\$74,999	\$75,000-\$99,999	\$100,000 or More	Total
50-54 Years	8.7%	17.4%	23.9%	17.4%	15.2%	17.4%	100%
55-64 Years	10.7%	18.4%	21.4%	25.2%	13.6%	10.7%	100%
Over 65 Years	12.2%	24.4%	34.8%	20.7%	4.3%	3.7%	100%

To gauge income from another perspective, about one fifth (17.3%) of participating seniors say that more than half of their income comes from Social Security. Of those participants 65 years and over, about one-third (31.9%) say that more than half of their income comes from Social Security.

Survey participants report how they perceive their overall health, with findings presented in Exhibit G.

Exhibit G
Self-Reported Condition Of Overall Health, Compared To Others
(n=496)



Half (50.0%) say their health is good and 39.9% say they are very healthy. That the vast majority of participating seniors say their health is either good or very healthy suggests that seniors who responded to the survey might represent a comparatively healthier cross-section than the overall senior population. This finding will be important to consider when interpreting upcoming findings about practical barriers to volunteer service such as transportation and health concerns.

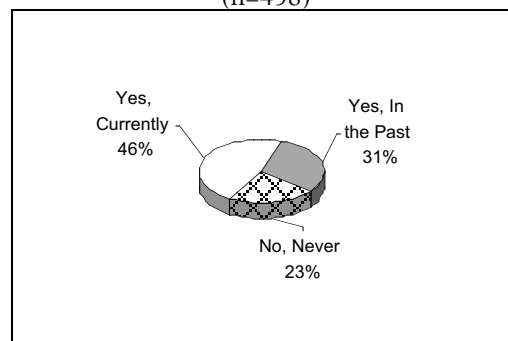
Furthermore, as might be expected, younger survey participants are more likely to be healthier. Respondents who are 50-54 years old are the most likely to say they are “very healthy” (47.8%) compared to those who are 55-64 years old (40.2%) and 65 years and over (35.9%) (χ^2 , $p=.038$).

In terms of differences in self-reported health by race/ethnicity, Caucasian respondents are the most likely to say they are “very healthy” (41.9%) and African Americans the least likely (12.5%), with Latino/as (27.9%) and Asian/Pacific Islanders (32.4%) falling proportionately in between (χ^2 , $p=.006$).

There are no gender differences in self-reported health among these seniors.

In terms of religious affiliations, just under half (46.6%) report they are current members of a church, temple, or other religious organization, with about an additional 30.9% reporting they have been affiliated in the past. Exhibit H below depicts these findings.

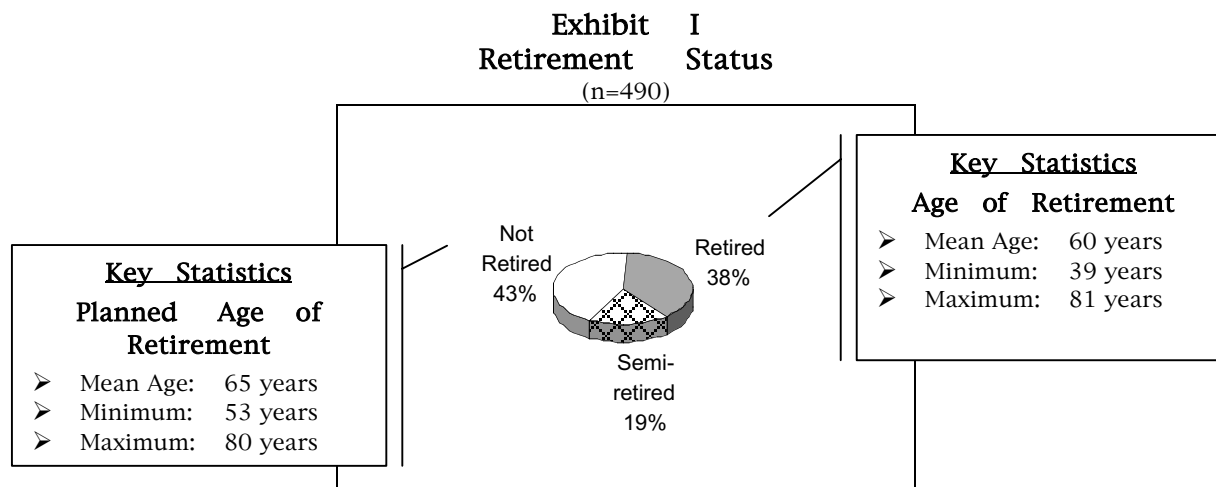
Exhibit H
Have You Ever Been Affiliated With A Church, Temple, Or Other Religious Organization?
(n=498)



There is no relationship between the age of participants and whether they are or have been affiliated with a religious organization.

RETIREMENT AND WORK STATUS

Retirement and work status are key descriptors of seniors participating in this assessment. Participants' retirement status is provided in Exhibit I below.



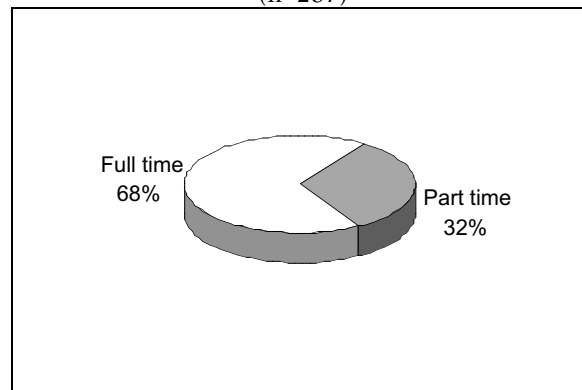
Thirty-eight percent (38.2%) of these seniors are retired. The average age at which these participants retired is 60 years. Forty-three percent (43.1%) of these seniors are not yet retired, and these participants report they plan to retire, on average, at the age of 65 years.

It is interesting to note that participating seniors with less formal education indicate they plan to retire later in life than those with more formal education. Respondents with some elementary school education plan on retiring at age 74 and those with some high school education plan on retiring at age 69, as compared with age 65 for seniors overall (ANOVA, $p=.019$).

Our analysis revealed that age is statistically more powerfully correlated than retirement status with key assessment findings. We therefore consistently provide differences related to key findings using age rather than retirement status—except where the findings for retirement status hold up after we control for age in the analysis.

Exhibit J provides the full- or part-time work status of those seniors who report they are not yet retired or are semi-retired.

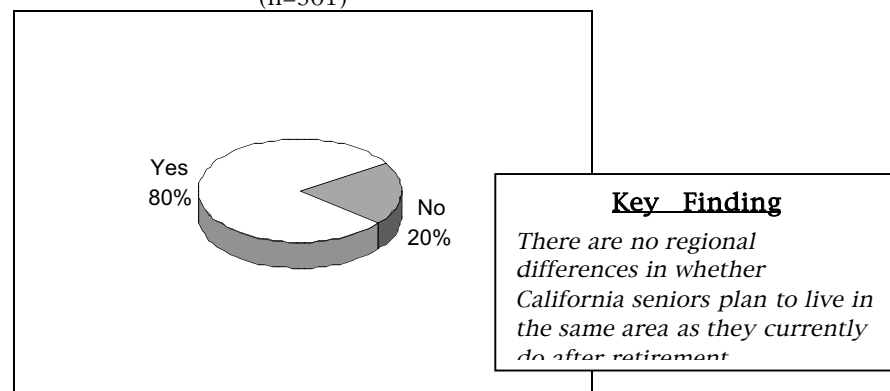
Exhibit J
Work Status Among Seniors Who Are Semi-Retired And Not Retired
 (n=287)



About two thirds (67.9%) of seniors who are still in the workforce are working full time.

Whether seniors plan to live in the same area after they retire or plan to move may be relevant for future planning purposes. Exhibit K, below, illustrates these proportions.

Exhibit K
If You Have Not Retired Yet, Do You Plan To Live In The Same Area After Retirement?
 (n=301)



According to these seniors, the majority (80.1%) plans to remain in the same area where they live now—regardless of what California region that might be—once they retire.



APPENDIX B

Assessment Methods

ASSESSMENT METHODS

The California Assessment of Seniors and Service employed the following research methods to accomplish study goals:

- Secondary demographic data collection;
- Materials review;
- Mail survey; and
- Focus groups.

These methods will be discussed in more detail following a brief description of the study's setting.

SETTING

With a goal of including individuals age 50 to 75 throughout California, the research team divided the state into four geographic regions. The four regions served as the primary stratum on which the survey sample was constructed and where focus group discussions were held. The regions are:

- **Northern**, including Lassen, Modoc, Plumas, Shasta, Siskiyou, Tehama, and Trinity counties;
- **Southern**, including San Bernadino, Los Angeles, Orange, Riverside, and Ventura counties;
- **Central**, including Calaveras, Fresno, Kern, Kings, Madera, Merced, San Joaquin, Stanislaus, and Tulare counties; and
- **San Francisco/Bay Area**, including Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara counties.

Combined, the four regions include 27 counties. Two regions (Southern and San Francisco/Bay Area) are more densely populated urban centers, whereas the Central and Northern regions are comparatively more suburban and/or rural.

SECONDARY DEMOGRAPHIC DATA COLLECTION

LFA researched demographic characteristics of individuals between 50-75 years of age within each region to devise a meaningful sampling plan. In particular, we researched the racial and ethnic characteristics of each region (i.e., proportion of African Americans, Asian/Pacific Islanders, Caucasians, Latinos/as, and Native Americans and to each region's total population), and ascertained the gender ratio in each area. These data informed the proportion of respondents requested in the overall survey sample, as described below.

MATERIALS REVIEW

The research team carefully reviewed two recent surveys—one statewide (Hawai'i) and the other national—with foci similar to the California Assessment of Seniors and Service study goals. Both studies found a significant interest in volunteer activities and community service among older Hawaiians and among older adults throughout the United States. The Hawai'i study, *Senior Volunteers As Assets: A Statewide Survey* (2001), was sponsored by the Hawai'i Community Foundation. It researched the differences between senior volunteers and non-volunteers in Hawai'i and explored barriers and incentives to senior volunteer participation. A national study sponsored by Civic Ventures, *The New Face of Retirement: Older Americans, Civic Engagement, and the Longevity Revolution* (1999), surveyed individuals 50-75 years of age and community leaders in order to examine attitudes towards retirement and involvement in community service.

MAIL SURVEY

In order to obtain information from a broad cross-section of California seniors, LFA sent a mail survey to 2,400 seniors across the state. Information about the survey sample and survey instrument is delineated below.

Survey Sampling Plan

To construct the survey sample, LFA obtained a stratified randomly selected list of 2,400 names and addresses from Scientific Telephone Samples (STS). We requested that the sample be constructed largely of seniors between the ages of 50 and 75 and that it include a representative group in terms of annual income.

We first stratified the total sample of 2,400 names and addresses by the four geographic regions. We then stratified the sub-samples of 600 names in each region by gender—with equal representation of men and women in all regions—and by race/ethnicity. The proportionate representation of racial/ethnic groups in the sample varied based on the proportion of the overall population each racial/ethnic group accounted for in each region. Racial/ethnic groups in the stratification process included African American, Asian/Pacific Islander, Caucasian, and Latino/a.⁵ The research team over-sampled for Asian/Pacific Islander, Latino/a, and African American populations to account for an expectation of under-representation in returns.

The eventual percentages of each subgroup by region in the sampling plan are presented in the exhibit below.⁶

⁵ Because STS could not provide a sample of Native Americans, we were unable to over-sample this ethnic subgroup within each region.

⁶ To obtain the requested percentages of each ethnic subgroup, STS determined Asian/PI and Latino/a individuals based on surnames. For African Americans, names and addresses were pulled from census blocks with a high population density of African American residents (50% or higher) to increase the likelihood of their representation in the sample.

Survey Sampling Plan

Region	Characteristic	Proportion of the Overall Population ⁷	Proportion in the Survey Sample
California Overall	Gender		
	Male	48%	NA
	Female	52%	NA
	Race/Ethnicity		
	African American	7%	NA
	Asian/Pacific Islander	11%	NA
	Caucasian/White	46%	NA
	Latino/a	36%	NA
	Native American	1%	NA
Central California	Gender		
	Male	48%	50%
	Female	52%	50%
	Race/Ethnicity		
	African American	4%	10%
	Asian/Pacific Islander	7%	15%
	Caucasian/White	67%	40%
	Latino/a	21%	30%
	Native American	1%	5%
Southern California	Gender		
	Male	48%	50%
	Female	52%	50%
	Race/Ethnicity		
	African American	8%	15%
	Asian/Pacific Islander	11%	15%
	Caucasian/White	59%	35%
	Latino/a	22%	30%
	Native American	1%	5%
Northern California	Gender		
	Male	50%	50%
	Female	50%	50%
	Race/Ethnicity		
	African American	1%	5%
	Asian/Pacific Islander	1%	5%
	Caucasian/White	92%	70%
	Latino/a	4%	10%
	Native American	3%	10%
San Francisco Bay Area	Gender		
	Male	48%	50%
	Female	52%	50%
	Race/Ethnicity		
	African American	8%	15%
	Asian/Pacific Islander	20%	30%
	Caucasian/White	60%	35%
	Latino/a	12%	15%
	Native American	1%	5%

⁷

RAND California: An Online Source for California and US Statistics: <http://ca.rand.org/>

Survey Instrument

Working in close collaboration with the study's sponsors and architects, LFA designed a mail survey to address each of the study's goals. LFA worked with a professional survey mail house, ADF Research, for survey production and mailing. The instrument was designed to assess how much volunteer experience, if any, respondents have, and what kinds of activities, programs, and causes are the most appealing to them. The survey also explored the motivations and barriers that influence respondents' level of interest in volunteerism. Questions about how individuals perceived retirement and what types of activities they are currently doing (or planning to do) during retirement were also included in the survey.

To understand the profile of the group and how the responses regarding volunteering might differ by characteristics, some demographic and other descriptive questions were also included (e.g., health, income, level of education, etc.). The final question in the survey asked whether or not a respondent would be interested in participating in a focus group to discuss these questions/issues in more detail.

To clarify a common definition of volunteering for survey participants, the survey opened with the following text:

“Volunteering” may mean different things to different people. For the purposes of this survey, “volunteering” is defined as any activity that is unpaid—freely given—time, expertise, energy, etc. There are a few common ways for people to get involved in volunteering: helping individuals, organizations, or causes.

The survey instrument is included in Appendix C.

Survey Response Rate

Out of 2,400 surveys mailed, 502 were completed and returned for analysis and another 118 were returned as undeliverable. Accounting for the undeliverable surveys, the final rate of response to the survey was 22.0%.

In the first two weeks after the survey had been sent, initial returns were lower than expected; the response rate was around 10% for these first weeks. To enhance the response rate, a postcard reminder notice was sent out and the deadline was extended. Furthermore, LFA offered in the postcard notice to conduct the survey by telephone. These efforts produced the desired result, ultimately doubling the response to the 22.0% rate.

Across regions, the rate of response is consistent with the exception of Northern California. The response rate for the Northern California region is 30.0%, compared to 18.3% for the Southern California region, 18.2% for the San Francisco Bay Area, and 17.2% for Central California.

Survey Data Analysis

The research and analysis team entered the survey data into a database in the Statistical Package for the Social Sciences (SPSS) software. Data were cleaned and recoded as necessary for analysis. First, we ran the overall frequency of response to each question. Second, the team ran multi-variate analyses to explore differences in overall responses by characteristics of interest, including:

- Age;
- Gender;
- Region;
- Race/ethnicity;
- Income;
- Retirement status;
- Health status; and
- Religious affiliation.

The research team conducted two types of statistical tests to explore whether differences in responses by characteristics were statistically significant. A “statistically significant” difference is best interpreted as one that is very likely due to a real relationship and not due to chance.

The two tests conducted are chi-square tests of independence and analysis of variance tests. Results from chi-square tests of independence are noted with a “ χ^2 ” symbol followed by a p-value indicating the level of statistical significance for the specific test (e.g., χ^2 , p=.002). Results from analysis of variance tests are noted with the abbreviation “ANOVA” followed by a p-value indicating the level of statistical significance for the specific test (e.g., ANOVA, p=.025).

As a rule, we used the 95% confidence level (p=.05) to determine whether to consider findings from statistical tests significant or not. Generally, the report includes only findings that emerged from the multi-variate analysis as statistically significant.

Limitations to the Survey Methodology

The LFA research team made every effort to ensure maximum validity of the survey methodology. In particular, we implemented a probability-proportionate-to-size sampling plan with a population-based survey sample to maximize confidence in the ability to generalize findings to the overall population of seniors in California.

The sample indeed appears to reflect the overall population, particularly in terms of income. The distribution of respondents in each income group follows a normal, bell-shaped curve, as would be expected with a representative population-based sample.

Despite these methodological rigors, the survey sample likely contains some biases for which the research team was unable to control. We are aware of two specific biases. First, we cannot know to what extent those who responded to the survey were more likely than those who did not respond to have been volunteers in the past or interested in volunteering in the future. The reader is cautioned to assume that prior volunteers and seniors interested in volunteering are over-represented in the sample, though by how much remains unknown.

One potential indicator of the extent of this “volunteer interest” sample bias is the gender breakdown of respondents. The survey sample is 60% female and 40% male, whereas for the 50-75 year old age group in California the actual gender breakdown is an even 50% for each group.

The second survey bias relates to the racial and ethnic distribution of the sample. The efforts to over-sample senior Californians who are people of color served the research well in that the ultimate survey sample closely reflects the overall population for African Americans and Asian/Pacific Islanders. However, Latino/a seniors in California appear to be significantly under-

represented in the survey sample; Latino/a seniors represent about 30% of the overall population yet account for only 10% of the survey sample. This may be due to the fact that the survey was implemented in English only.

FOCUS GROUP DISCUSSIONS

For an in-depth discussion of issues related to seniors' involvement in service activities, LFA conducted focus groups in the Southern, Central, and San Francisco/Bay Area regions. The purpose of the discussion groups was to provide seniors who have volunteer experience with an opportunity to explore the issues that motivate or deter them from volunteering. Participants for each group were recruited primarily, though not exclusively, through the Retired and Senior Volunteer Programs (RSVP) in each respective region.

An additional focus group with seniors who do not have any, or at least recent, volunteer experience was held in the San Francisco Bay Area. Participants for this group were recruited through the mail survey (i.e., those without prior volunteer experience who responded that they would be interested in further discussing volunteerism among seniors) as well as through local senior centers and religious organizations. This discussion focused on what might motivate seniors to start volunteering and what barriers stand in the way of their participation in community service activities.

The protocols that LFA developed for these focus groups are provided in Appendix C.

Focus Group Data Analysis

We used content analysis procedures to analyze the focus group data. Through content analysis, consistent themes within and across groups are identified. These focus group findings augment the survey analysis throughout the report.

Limitations to the Focus Group Methodology

Focus group data are qualitative in nature. The key benefit of this qualitative research method is that it allows in-depth assessment of key issues of interest. Because qualitative methods necessarily rely on the subjective reports of involved parties, data gathered in this way are biased by the individual experiences of informants. Additionally, data gathered through qualitative methods cannot be generalized to any larger population.

Furthermore, in the focus group with seniors who have not volunteered either at all or in the recent past, the definitional issue of what constitutes volunteering became clear. These participants had significant experience giving of their time through their church and social networks, though they did not see these activities as volunteering. While they provided many valuable insights that further our understanding of the assessment questions, additional investigation into the experiences of seniors who have never volunteered their time, either formally or informally, would provide another perspective on how to engage the range of California seniors in service.

Lastly, it is important to note that the focus groups were racially and ethnically diverse and participants range in age from 56 to 87 years. In all focus groups, most participants are women. This indicates that it may be useful to conduct targeted groups with men.



APPENDIX C

Instruments and Protocols:

Survey Instrument

Senior Volunteer Focus Group Protocol

Seniors Without Prior Volunteer Experience Focus Group Protocol

California Assessment of Seniors and Service

PLEASE NOTE THAT THE FOLLOWING REPRESENTS THE QUESTIONS ASKED IN THE ASSESSMENT SURVEY, BUT THAT THE FINAL INSTRUMENT SENT TO SENIORS WAS NUMBERED AND FORMATTED BY A PROFESSIONAL GRAPHIC PRODUCTION SERVICE.

“Volunteering” may mean different things to different people. For the purposes of this survey, “volunteering” is defined as any activity that is unpaid—freely given—time, expertise, energy, etc. There are a few common ways for people to get involved in volunteering: helping individuals, organizations, or causes.

Volunteer Experience

Q: Thinking about your most recent volunteer experience, how long ago was that experience? (Please check one response only)

- ☐ Never volunteered
- ☐ In the past two months
- ☐ In the past year
- ☐ More than a year ago

Q: Thinking about your most recent volunteer experience, how often did you give of your time? (Please check one response only)

- ☐ Never volunteered
- ☐ One or more times a week
- ☐ Once or twice a month

Q: Thinking about your most recent volunteer experience, how many hours per week did you contribute on average? (Please check one response only)

- ☐ Never volunteered
- ☐ 1 hour or less per week
- ☐ 2-4 hours per week
- ☐ 5-15 hours per week
- ☐ More than 15 hours per week

Q: If you have volunteered in the past year, how did you find out about the volunteer opportunity?

- ☐ Newspaper
- ☐ Radio
- ☐ Television
- ☐ Church or temple
- ☐ School
- ☐ Work
- ☐ Senior center or senior club
- ☐ Another club or organization
- ☐ A friend or relative
- ☐ Word of mouth
- ☐ Other method(s) _____

Q: Have you ever participated in a full- or part-time volunteer commitment that is 1 year or longer, such as Vista or the Peace Corps?

- ☐ Yes
- ☐ No

Q: If not, would you consider making a full- or part-time 1-year volunteer commitment, for example, working with a community-based organization mentoring or tutoring children?

- ☐ Yes
- ☐ Maybe
- ☐ Definitely Not

Q: Looking 2 or 3 years into the future, do you think your involvement in volunteering will increase, decrease, or stay the same?

☐ Increase

☐ Decrease

☐ Stay the Same

Q: Have you donated money or goods for an organization or charitable cause in the past year?

☐ Yes

☐ No

Level of Interest in Service

Q: Of the following **programs or causes**, please indicate which you are currently involved with, which ones might interest you, and which ones do not interest you at all. (Please check one response for each program or cause)

Program or Cause	Currently Involved	Interested In Getting Involved	Not Interested In Getting Involved
Children or youth programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adult programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seniors programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education programs (schools, libraries etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health services programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social services programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Programs/causes that address community issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environmental programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Programs that benefit animals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Political parties or candidates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Political advocacy campaigns or issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Programs that increase community safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Programs that promote culture and the arts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Religious or church-affiliated programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Types of Activity or Service

Q: The following list is comprised of **activities** people do for volunteer work. Please indicate whether you are currently doing a particular activity, if you might be interested in doing it , or if you are not at all interested in doing it. (Please check one response for each activity)

Type of Activity or Volunteer Work	Currently Doing It	Interested in Doing It	Not Interested in Doing It
Teaching or tutoring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reading with children or adults	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being a mentor/role model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Counseling or providing emotional support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Providing childcare	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Doing clean-up or beautification projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting with isolated or lonely people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving people to appointments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delivering groceries or meals to people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helping people with daily tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Serving on a board or committee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Doing office work (e.g., phones, filing, mailings)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organizing events or activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Writing articles, essays or newsletters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creating art (visual or performance)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Availability

Q: Are there times of year when it is or would be easier for you to volunteer? (Please check all that apply)

- ☐ Spring months ☐ Summer months ☐ Fall months ☐ Winter months

Q: If you were to volunteer, how often would you be interested in volunteering?

- ☐ Not interested in volunteering
☐ Once or twice a month
☐ One or more times a week

Q: If you were to volunteer, how many hours would you be willing to contribute on average each week?

- ☐ Not interested in volunteering
☐ 1 hour or less per week
☐ 2-4 hours per week
☐ 5-15 hours per week
☐ More than 15 hours per week

Q: If you were able to volunteer 15+ hours per week, would you be interested in a program that works directly with children (tutoring and mentoring) and provides you with a regular stipend for your time?

- ☐ Yes ☐ Maybe ☐ Definitely Not

Reasons for Involvement

Q: If you have volunteered before or are currently volunteering, please indicate the reason or reasons that you volunteer. (Please check all that apply)

- ☐ Volunteering makes me feel good about myself.
☐ It makes me feel like I've accomplished something real and useful.
☐ I feel compassion toward people in need.
☐ I can make new contacts that might help my business or career.
☐ Volunteering is valued by our society.
☐ Volunteering gives me a new perspective on things.
☐ It makes a positive difference in the community where I live.
☐ I like new challenges and learning new things.
☐ I like to spend time with other people.
☐ When I volunteer, I feel better physically.
☐ I volunteer for some other reason:
_____.

Q: Please indicate which of the following statements are **True** for you and which are **False**.

<i>I would start or do more volunteer work...</i>	True	False
...if I received a regular stipend.	<input type="checkbox"/>	<input type="checkbox"/>
...if I were given assistance finding out about volunteer activities.	<input type="checkbox"/>	<input type="checkbox"/>
...if I were given special accommodations for physical disabilities.	<input type="checkbox"/>	<input type="checkbox"/>
...if organizations improved their "attitudes" toward volunteers.	<input type="checkbox"/>	<input type="checkbox"/>
...if I were given an educational award or scholarship that could be transferred to others such as children or grandchildren.	<input type="checkbox"/>	<input type="checkbox"/>
...if I weren't so busy with work.	<input type="checkbox"/>	<input type="checkbox"/>
...if I weren't so busy with family.	<input type="checkbox"/>	<input type="checkbox"/>
...if I were in better health.	<input type="checkbox"/>	<input type="checkbox"/>
...if I had better transportation to get to a volunteer opportunity.	<input type="checkbox"/>	<input type="checkbox"/>

<i>I would start or do more volunteer work...</i>	True	False
...if the volunteer opportunity was closer to where I live.	<input type="checkbox"/>	<input type="checkbox"/>
...if the volunteer opportunity had convenient hours.	<input type="checkbox"/>	<input type="checkbox"/>
...if I could be given clear and specific tasks to do.	<input type="checkbox"/>	<input type="checkbox"/>
...if the organization trained me to do the work.	<input type="checkbox"/>	<input type="checkbox"/>
...if I knew I had the skills needed to do a good job.	<input type="checkbox"/>	<input type="checkbox"/>
...if I knew the volunteer environment was both safe and pleasant.	<input type="checkbox"/>	<input type="checkbox"/>
...if I knew the volunteer opportunity was meaningful, or made a difference in people's lives.	<input type="checkbox"/>	<input type="checkbox"/>
...if I got to meet interesting people and make new friends.	<input type="checkbox"/>	<input type="checkbox"/>
...if I knew someone else who also worked or volunteered there.	<input type="checkbox"/>	<input type="checkbox"/>
...if I received some form of return—for example, meals, prescription drug discounts, token payments, or educational award/scholarship—in return for my time and services.	<input type="checkbox"/>	<input type="checkbox"/>
...if I were recognized or appreciated for my work as a volunteer.	<input type="checkbox"/>	<input type="checkbox"/>
...if I found an organization with values and a mission that I truly support.	<input type="checkbox"/>	<input type="checkbox"/>
...if the organization that needed help was one that had, in the past, helped me or someone I love.	<input type="checkbox"/>	<input type="checkbox"/>
...if the volunteer opportunity was offered or needed by an organization or group I already belong to.	<input type="checkbox"/>	<input type="checkbox"/>

Q: Is there a reason (or reasons) not mentioned above why you would NOT get involved with volunteering now or in the future?

Retirement Status and Attitude Towards Retirement

Q: Are you: ☐ Retired ☐ Semi-retired ☐ Not retired

Q: If retired, at what age did you retire? _____ years

Q: People today have different ideas about what retirement means to them. For each of the following statements about retirement, please indicate how much you agree with each.

Regarding retirement, I feel...	Strongly Agree	Agree	Disagree	Strongly Disagree
It is a time to take it easy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is a time to enjoy leisure activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is a time to take a much-deserved rest from work and daily responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is an opportunity to start new activities or learn new skills—things I've always wanted to do but never had the time for.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is a time to set new goals and pursue new challenges, a time to expand horizons.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q: If you are not yet retired, do you work full time or part time at your current job?

☐ Full time ☐ Part time

Q: If not yet retired, how many more years do you plan to continue working at your job? _____ years

Q: What kind of work do (or did) you do? (Please check all that apply)

- ☐ Labor or Production (e.g., factory, landscape, mover, janitor)
- ☐ Skilled Trades (e.g., cook, chef, carpenter, repair person)
- ☐ Customer Service (e.g., cashier, telephone operator, security guard)
- ☐ Clerical / Administrative (e.g., file clerk, typist, bookkeeper)
- ☐ Professional (e.g., nurse, paralegal, social worker, teacher)

Q: What kinds of activities do you plan to do (or are currently doing) in retirement? (Please check all that apply)

- ☐ Traveling
- ☐ Volunteering or being involved in community service
- ☐ Being involved in sports or fitness activities
- ☐ Pursuing new hobbies
- ☐ Taking courses or continuing your education
- ☐ Belonging to social clubs, such as book clubs, bridge clubs, bird watching, or gardening clubs
- ☐ Finding a new paid job part time
- ☐ Finding a new paid job full time

Q: If you haven't yet retired, do you plan to live in the same area after retirement?

- ☐ Yes
- ☐ No

Q: In terms of personal preference, would you rather volunteer for work that is **SIMILAR TO** or **DIFFERENT FROM** what you do or did for your career job?

- ☐ I would prefer to do volunteer work that is **similar to** my career job.
- ☐ I would prefer to do volunteer work that is **different from** my career job.

Demographic and Other Characteristics

Q: What age are you today? _____ years

Q: What is your gender? ☐ Female ☐ Male

Q: Including yourself, how many people live in your household? _____ people

Q: Who else lives in your house with you?

- ☐ Spouse/Life Partner
- ☐ Child(ren)
- ☐ Grandchild(ren)
- ☐ Siblings
- ☐ Relatives
- ☐ Friend(s) (other than relatives)
- ☐ Shared living with other paying adults (housemates or roommates)
- ☐ Communal living situation

Q: What is your racial or ethnic background?

- ☐ Native American
- ☐ Caucasian
- ☐ Black or African-American
- ☐ Asian or Pacific Islander
- ☐ Hispanic or Latino/a
- ☐ Multi-ethnic
- ☐ Other

Q: Are you, or have you ever been, a member of a professional organization?

- ☐ Yes ☐ No

Q: If yes, which one(s)? _____

Q: Are you, or have you ever been, affiliated with a church, temple, or other religious organization?
(Please check one response only)

- ☐ Yes, currently affiliated ☐ Yes, affiliated in the past ☐ No, never affiliated

Q: Are you a member of AARP (formerly the American Association of Retired Persons)?

- ☐ Yes ☐ No

Q: What is the highest level of education that you completed? (Please check one response only)

- ☐ Some elementary/middle school
☐ Some high school/high school diploma/GED
☐ Some college/college degree
☐ Some graduate school/graduate degree
☐ Some professional, trade, or technical school/degree

Q: Compared to others your age, how would you describe the condition of your overall health?

- ☐ Not so good ☐ Good ☐ Very healthy

Q: In the past year, what was the total income of your household?

- ☐ Less than \$15,000
☐ \$15,000 to \$30,000
☐ \$30,000 to \$50,000
☐ \$50,000 to \$75,000
☐ \$75,000 to \$100,000
☐ More than \$100,000

Q: Does more than half of your current income come from Social Security?

- ☐ Yes ☐ No

Q: Would you be interested in participating in a focus group held in your community to discuss some of these issues in more detail (you will be reimbursed \$25 for your participation)?

- ☐ Yes ☐ No

Thank you for your time!

CALIFORNIA ASSESSMENT OF SENIORS AND SERVICE

SENIOR VOLUNTEERS' FOCUS GROUP PROTOCOL

Location of Group:

Date of Group:

Introduction and Overview

Thanks for coming today to talk with us about volunteering and community service. My name is _____ and my colleague is _____. We're with LaFrance Associates, an independent consulting group that does research and evaluation for nonprofit organizations. We're now working with the Governor's Office on Service and Volunteerism, AARP, and Civic Ventures to do a study of interest among seniors in volunteerism—what motivates seniors to volunteer, what issues make it difficult for seniors to volunteer, and how the State can help to engage more seniors in volunteer service.

I'm first going to go over a few details before we start. If you have any questions, feel free to ask them as they come up.

- **Purpose of the group.** The Governor's Office on Service and Volunteerism, AARP, and Civic Ventures want to hear directly from seniors such as you who have volunteered about what motivates you to volunteer and how you can best be supported in your volunteer efforts. Most importantly, your comments will be included in a report to the Governor that will help shape policy and funding decisions about seniors and volunteering.
- **Role of facilitator and note taker.** I will be leading the conversation today and (my colleague) will be taking notes during the conversation. We'll get into a few guidelines for how you can help us to do our jobs in just a moment.
- **Confidentiality.** Everything you tell us today will be kept strictly confidential. Your answers will not be linked to your names when we report on the findings.
- **Use of the tape recorder.** As you can see, we also have a tape recorder to capture the conversation. Is everyone OK with us using the tape recorder? The reason why we want to use it is to back up our notes – in case there's anything we miss in the handwritten notes.
- **Incentive.** At the end of the group, you will each get \$25 as a token of our appreciation of your time and reflection on their workshops.

Ground Rules for the Group

I'd like to outline a few ground rules for the conversation:

- There are no right or wrong answers. We want to hear what each of you think and feel. Please respect what others have to say, even when their opinion is different from yours.
- Please speak one at a time – this will help the note taker capture everyone's thoughts and opinions.
- If you agree with what someone says, speak up, rather than nodding your head or gesturing in some other way. The tape recorder can't see you!

Does anyone else have other ground rules they'd like to propose? Do you have any other questions before we begin?

Discussion Questions

1. Please tell us your name, your age, and a little bit about your volunteer experience, such as how long you've been volunteering, where you volunteer now (if you are currently volunteering), etc. Are you retired now, and if so, for how long have you been retired? How does service fit into your overall plans for your retirement years?

2. What first interested you in volunteering? And what made you first **decide** to volunteer, i.e., after you became interested in volunteering, what was your next step to identify a volunteer experience? (Probe: grew up volunteering, heard of program that was interesting, looking to spend free time in meaningful ways, etc.)
3. Thinking about someone who was interested in volunteering but didn't know what next step to take, what would you suggest as the easiest way to help that person actually get involved with volunteering? Do you think it would be easier to follow-up on volunteer interest if there were a web site? An 800 number or hotline? Other ideas?
4. What kinds of practical issues make it difficult for you to volunteer? Have you resolved these issues, and if so how? What other kinds of issues make it difficult for you to volunteer?
5. What are some things that an organization can do to make it easier for you to volunteer?
6. Imagine that you are running a volunteer organization and you need to come up with an ad campaign to get seniors involved in service. What slogan would you come up with? What would get your attention? And through what medium?
7. What words of encouragement would you say to someone such as yourself who is considering starting to volunteer?
8. Are there particular groups of people you prefer to volunteer with? (Probe: kids, adults, people in need, etc.) What kinds of reactions do you have when you hear the State is interested in promoting inter-generational service among seniors and children/youth? If you are interested in working with children/youth, what ages of kids are you most interested in working with?
9. When you are looking for a volunteer position, what things are you looking for? (Probe: type of activities you would be engaged in, type of organization receiving your services, ways you expect to benefit from the experience, practical concerns such as schedule and distance required to travel). How far are you willing to travel?
10. Under what circumstances would you volunteer 15+ hours a week in a program that works directly with children tutoring and mentoring? (Probe: what incentives would make this level of commitment attractive, such as cost reimbursement, tax-free stipend, education credits, etc.)
11. What keeps you volunteering? Are there things that would make it easier for you to maintain longer volunteer commitments?
12. What has been the most rewarding part of your volunteer experience(s)? Has volunteering changed your life in any way? If so, how?
13. Have you ever had a bad volunteer experience? What made it that way?
14. Is there anything else you would like to add about your volunteer experience specifically or about seniors and volunteering in general?

Thank you very much for your time and participation!

CALIFORNIA ASSESSMENT OF SENIORS AND SERVICE

FOCUS GROUP PROTOCOL – SENIORS WITH NO PRIOR VOLUNTEER EXPERIENCE

Location of Group: _____

Date of Group: _____

Introduction and Overview

Thanks for coming today to talk with us about volunteering and community service. My name is _____ and my colleague is _____. We're with LaFrance Associates, an independent consulting group that does research and evaluation for nonprofit organizations. We're now working with the Governor's Office on Service and Volunteerism, AARP, and Civic Ventures to do a study of interest among seniors in volunteerism—what might motivate seniors to volunteer, what issues would make it easier for seniors to volunteer, and how the State can help to engage more seniors in volunteer service.

I'm first going to go over a few details before we start. If you have any questions, feel free to ask them as they come up.

- **Purpose of the group.** The Governor's Office on Service and Volunteerism, AARP, and Civic Ventures want to hear directly from seniors such as you who have not volunteered previously about what might motivate you to volunteer and how they could make it easier for you to volunteer. Most importantly, your comments will be included in a report to the Governor that will help shape policy and funding decisions about seniors and volunteering.
- **Role of facilitator and note taker.** I will be leading the conversation today and (my colleague) will be taking notes during the conversation. We'll get into a few guidelines for how you can help us to do our jobs in just a moment.
- **Confidentiality.** Everything you tell us today will be kept strictly confidential. Your answers will not be linked to your names when we report on the findings.
- **Use of the tape recorder.** As you can see, we also have a tape recorder to capture the conversation. Is everyone OK with us using the tape recorder? The reason why we want to use it is to back up our notes – in case there's anything we miss in the handwritten notes.
- **Incentive.** At the end of the group, you will each get \$25 as a token of our appreciation of your time and reflection on their workshops.

Ground Rules for the Group

I'd like to outline a few ground rules for the conversation:

- There are no right or wrong answers. We want to hear what each of you think and feel. Please respect what others have to say, even when their opinion is different from yours.
- Please speak one at a time – this will help the note taker capture everyone's thoughts and opinions.
- If you agree with what someone says, speak up, rather than nodding your head or gesturing in some other way. The tape recorder can't see you!

Does anyone else have other ground rules they'd like to propose? Do you have any other questions before we begin?

Discussion Questions

1. Please introduce yourself by telling us a little bit about yourself, such as:
 - a. Your name,
 - b. Your age,
 - c. Who lives in your house with you,

- d. Whether you are retired or not (and if so, how long you have been retired), and
 - e. What you do or did for your work/career.
2. How do you spend your time these days? (Probe: travel, hobbies or sports, spending time with family, taking courses or continuing education, social clubs, etc.)
 3. Was there ever a time when you were thinking about volunteering? Please tell me about that. What got your attention or made you think about doing this? What ultimately prevented you from volunteering? Are you presently interested in volunteering – no, somewhat, very? And if you've volunteered before but stopped, what were the reasons why you stopped?
 4. During the past year have you been asked by a friend or another person to volunteer?
 5. What type of message or ad campaign do you think would encourage you and people like yourself to think more seriously about volunteering? What slogan would appeal to you? What would get your attention? And through what medium?
 6. If you were to volunteer, are there particular groups of people you would prefer to volunteer with? (Probe: kids, adults, people in need, etc.) What kinds of reactions do you have when you hear the State is interested in promoting inter-generational service among seniors and children/youth? If you might be interested in working with children/youth, what ages of kids would you be most interested in working with?
 7. What kinds of practical issues might make it difficult for you to volunteer? What are some ways that these issues could be overcome? (Probe: what incentives would make you more interested in volunteering, such as cost reimbursement, training, tax-free stipend, education credits, etc.)
 8. What are some things that an organization can do to make it easier for you to volunteer?
 9. Do you belong to a church, temple, mosque, or other religious/spiritual group? Is the church/ temple/ mosque a good vehicle for getting information out about potential volunteer opportunities?
 10. If you were thinking about starting to volunteer but didn't know what next step to take, what would be the easiest way for you to get more information to help you actually get involved with volunteering? Would it be easier to follow-up on your volunteer interest if there were a web site? An 800 number or hotline? Other ideas?
 11. Are there certain types of activities that you would prefer to do if you were to volunteer?
 12. Under what circumstances would you volunteer 15+ hours a week in a program that works directly with children tutoring and mentoring? (Probe: what incentives would make this level of commitment attractive, such as cost reimbursement, training, tax-free stipend, education credits, etc.)
 13. Do you have any other thoughts you would like to share with me about what might interest seniors like yourself in volunteering?

Thank you very much for your time and participation!

APPENDIX D

About the Study Sponsors

ABOUT THE STUDY SPONSORS

GOVERNOR'S OFFICE ON SERVICE AND VOLUNTEERISM (GO SERV)

GO SERV, the Governor's Office on Service and Volunteerism, is dedicated to uniting Californians of all ages and backgrounds in service to their communities. GO SERV promotes citizen involvement in all forms of community service, service learning, and volunteerism. Established in 1994, and formerly named the California Commission on Improving Life through Service, GO SERV directly administers the state's AmeriCorps programs. Annually, over 10,000 Californians commit a year of their life to serving in AmeriCorps to address many of the state's most critical problems in the areas of education, public safety, health and human services, and the environment. GO SERV also administers the Cesar Chavez Day of Service and Learning program that annually engages hundreds of thousands of students in grades K-12 in service learning activities that honor the legacy of this great Californian.

AARP

AARP is a nonprofit, nonpartisan membership organization for people 50 and over. It provides information and resources; advocates on legislative, consumer, and legal issues; assists members to serve their communities; and offers a wide range of unique benefits, special products, and services for its members, including the AARP Webplace at www.aarp.org, *Modern Maturity* and *My Generation* magazines, and the monthly *AARP Bulletin*. Active in every state, the District of Columbia, Puerto Rico, and the US Virgin Islands, AARP celebrates the attitude that age is just a number and life is what you make it.

CIVIC VENTURES

Civic Ventures is a California-based nonprofit organization devoted to promoting the social contributions of older Americans. Civic Ventures established their national signature program, Experience Corps, in 1995. Experience Corps "mobilizes the time, talent, and experience of older adults in service to communities," particularly to schools and youth-serving organizations. In 1999, Civic Ventures commissioned *The New Face of Retirement: Older Americans*, Civic Engagement, and the Longevity Revolution, the first major survey on older Americans' attitudes toward community service.

CORPORATION FOR NATIONAL SERVICE

The Corporation for National Service "engages more than a million Americans each year in service to their communities—helping to solve community problems." The Corporation's three major service initiatives are AmeriCorps, Learn and Serve America, and the National Senior Service Corps.